

Bringing your NDIS plan to life

A Plan Partners eBook



About this eBook: Bringing your NDIS plan to life!

The National Disability Insurance Scheme (NDIS) is the new system through which people with disabilities receive support. It's designed to help you achieve your life goals by giving you more control and choice over your supports.

At Plan Partners, we know that the first step to getting the most out of this new system is getting the right information. But it can be difficult to sort through the different sources and find practical, easy to understand information about the NDIS.

As Australia's leading expert in NDIS Plan Management and Support Coordination, Plan Partners are experts in the disability sector and we know the NDIS inside-out. We provide Plan Management and Support Coordination services to thousands of NDIS participants around the country, helping them bring their NDIS plan to life.

This eBook has been designed to change that by giving you everything you need in one easily accessible place. From NDIS basics to tips on how to get the most from your plan, this book will give you the tools you need to help you on your NDIS journey – whatever stage you're at.

Of course, we can't fit everything into one book. So if you need to know more about a specific part of your NDIS plan, or have questions which are not answered here, give our friendly team a call on **1300 333 700** or look for more information, including handy blogs, checklists and Easy English and Chinese language brochures, at **www.planpartners.com.au**

Plan Partners, 2018

This e-book contains general information and doesn't take your personal circumstances into account. Please consider whether the information is right for you before making a decision.

Plan Management Partners Pty Ltd | ABN 54 609 868 993

The foundation of your NDIS journey: your NDIS plan

The foundation of your NDIS journey is your **NDIS plan** – a document that outlines the supports you need and how much funding has been allocated to each. Your NDIS plan will generally cover a one-year period, after which it will be reviewed by the NDIS to determine what you need for the following year.

Your NDIS plan will be put together by the NDIS directly, or through a **Local Area Coordinator** - the organisation allocated to help people in a specific area to access the NDIS. They'll build your plan around your needs and goals, based on the information you give them during your planning meeting.

As your NDIS plan is such an integral part of your NDIS journey, it's important that you understand how a plan works and what should be in yours so you can get the most out of it.

This involves determining what you need in life, what your goals are and what supports will help you achieve them. To do this effectively, you'll also need to understand the language of the NDIS and how the NDIS determines what supports will be funded.

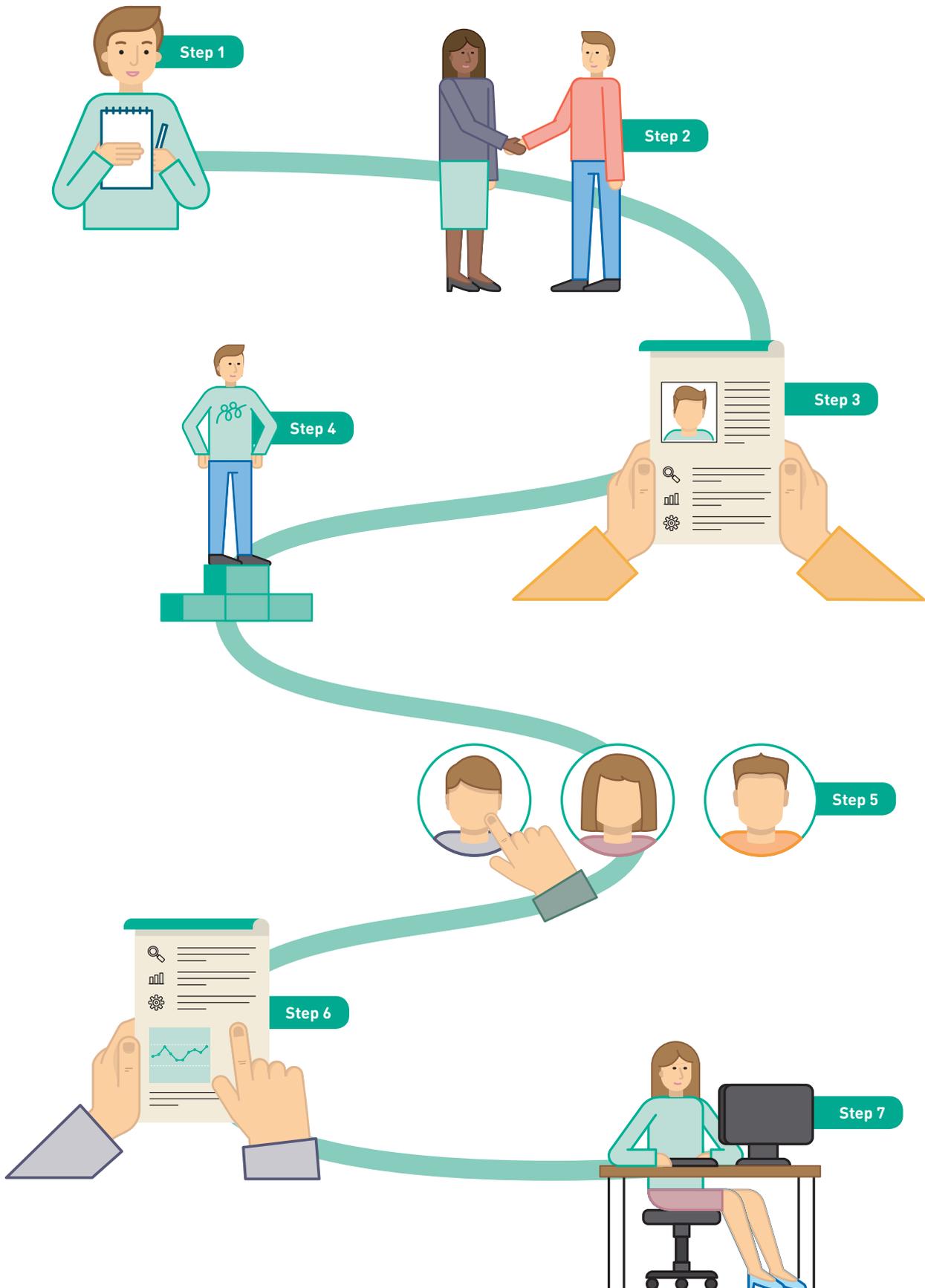
The NDIS uses the phrase '**reasonable and necessary**' to determine what you're eligible to receive. Some people can find this concept confusing, but once you understand the criteria, you can apply them when seeking funding for a particular support.

To be 'reasonable and necessary', the support you're requesting must:

- directly relate to your disability;
- represent value for money;
- help you achieve the goals and aspirations you identified in your NDIS Plan;
- get you more connected to your community, either socially or economically;
- use established, science-based methods and be likely to provide a real benefit; and,
- not be a substitute for something which should reasonably be funded or supplied by other parties.

You can find more detailed information about what is 'reasonable and necessary' in [this blog](#).

Your NDIS Journey



Your NDIS journey is an exciting one, but it can look a little complex at first sight. Let's break it down into seven simple steps and look at what you can do in each to get the most out of your NDIS plan.

Step 1: Prepare

Before you begin, it's important to understand how the system works and what's expected of you. You want to go into your planning meeting with a clear idea of the supports you might need to help you achieve your needs and goals.

Step 2: Your planning meeting

Your NDIS planning meeting is your chance to have your say and help shape what's funded in your NDIS plan for the upcoming year, so it's important to prepare well and ensure you're clear in what you're asking for and why.

Step 3: Get to know your NDIS Plan

After your planning meeting you'll receive your draft NDIS plan. Read it closely and ensure you're happy that it reflects what you want. Remember, it's your plan, so you get the final say. If you don't agree with something in your plan, you can request a review.

Step 4: Organise your NDIS finances

Over the course of your NDIS journey you'll need to ensure your service providers are being paid on time and keep track of the progress of your funding. If you've chosen to include Plan Management in your NDIS plan, it's now time to get your Plan Manager on board to help you manage your NDIS finances.

Step 5: Organise your supports

Finding the right providers is another very important part of the NDIS. Think about your options carefully and make sure your chosen providers are the right fit for your situation and needs. Setting up service agreements with each provider will help protect you from any disagreements or misunderstandings in the future. If Support Coordination is included in your plan, now's the time to enlist a Support Coordinator to help you find and connect with service providers.

Step 6: Track the progress of your plan

Now you've completed all the planning and organising, it's time to receive your supports and start enjoying the improvements they bring. You'll need to keep a record of all the supports you receive and when they're delivered, and - most importantly - keep track of your budget. If you choose Plan Management with Plan Partners, you can use our online dashboard to keep an eye on your budget with ease.

Step 7: Your annual plan review

Each year, you'll get the chance to meet with your Local Area Coordinator to review your plan, provide feedback and request any changes. Be clear about why you want to change your plan and bring any supporting documentation that might help.

Now, let's look at each step in more detail...

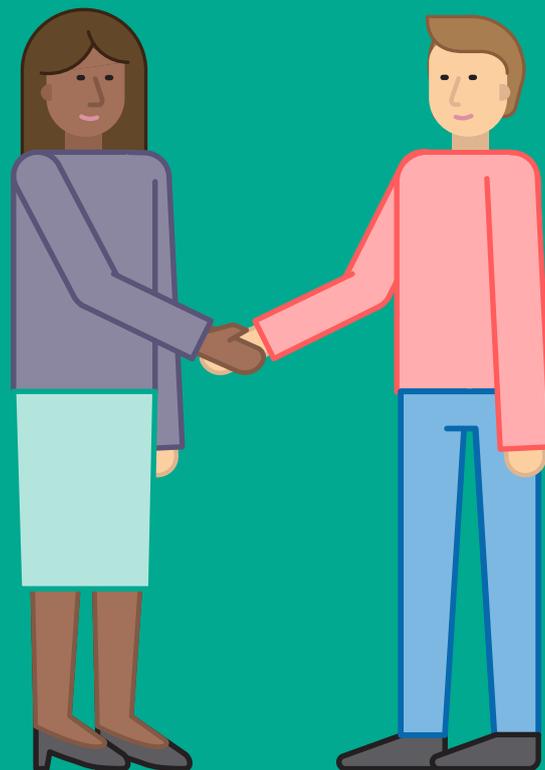
Step 1: Prepare



The preparation phase is arguably the most important, as it will set the tone for the rest of your NDIS journey. If you go into your planning meeting armed with an understanding of the NDIS and a clear vision of what you want to get out of it, you're much more likely to get an NDIS plan you're happy with. Some key steps for proper preparation include:

- Check if you're eligible at the NDIS website, and apply.
- Learn the basics about each step of your NDIS journey, including what the NDIS can fund and how it categorises supports.
- Well before your meeting, start thinking about your goals and how the NDIS can help you achieve them. Our checklist is a handy tool to help get you started – find it by clicking the button below.
- When requesting a meeting with your Local Area Coordinator, aim for a face-to-face discussion, as there's less room for misunderstandings.
- Ask for advice if anything is unclear or you need support determining how to get the most out of the NDIS – our team can help!

Step 2: Your planning meeting



Your planning meeting will establish what's included in your NDIS plan and how much funding you receive for each support. While that might seem stressful, it's also a fantastic opportunity to get the support you need. Make the most of your planning meeting with the following simple tips:

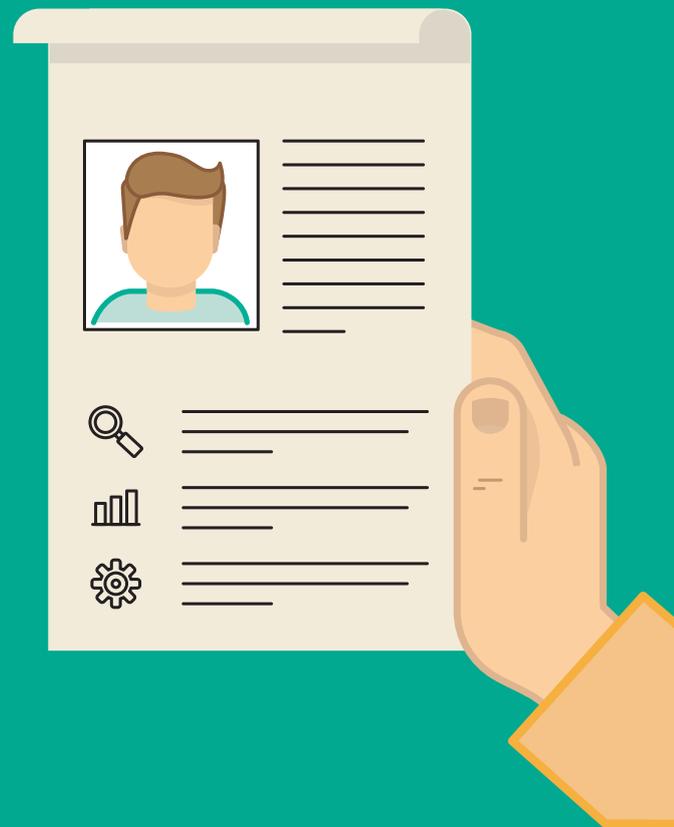
- Bring your checklist and any other documents you need to the meeting.
- Ask a family member, friend or someone you trust to come along for support.
- Be specific when discussing the supports you want and remember to tie things back to the 'reasonable and necessary' criteria.
- Express your needs and goals clearly so that your planner knows exactly what you want in your plan.
- Take plenty of notes so you can refer to them later.
- Ask questions! Don't be afraid to speak up or ask questions if anything is unclear.

In [this blog](#) we look at what exactly happens during a planning meeting, so you know what to expect and can prepare yourself.

If you require support with the management of your funds, such as processing invoices and tracking your budgets, be sure to request 'Plan Management' in your planning meeting and it will be included in your NDIS plan. More about this in Step 4.

If you would like help finding and connecting with the right service providers for your specific situation, make sure you discuss including 'Support Coordination' in your plan during the meeting. As not everyone is eligible for Support Coordination, explain clearly why you think you would benefit from this service. More about this in [Step 5](#).

Step 3: Getting to know your NDIS plan



So, you've had your planning meeting and received your brand new NDIS plan – but what does it all mean? Let's take a look at the three sections of your plan and what each covers:

Your profile

This talks about you and your day-to-day life, including where you live and your family and friends. It also states your 'services and community involvement', which are the supports you receive from the community or other government services.

Your Goals

This uses the information gathered at your planning meeting to describe your goals and aspirations. Your goals are broken up into short-term goals - what you need right now - and medium and long-term goals - the bigger things that you're working towards over the course of your NDIS journey.

Your Funded Supports

This section states your supports which are funded through the NDIS, and also states the budgets the NDIS has assigned for each type of support.

If you don't think that your NDIS plan accurately outlines what you discussed in your planning meeting, or if it's not right for you in some way, you can ask for a **review** within 90 days of receiving your plan. You can find out how to do this [here](#).

What supports does the NDIS fund?

The NDIS offers different types of funding for a wide range of supports, all designed to help you achieve your goals and reach your potential. Here's a brief rundown of how it works.

The NDIS offers three different funding types: **Core, Capital** and **Capacity Building**. Under these three funding types, supports are organised into what the NDIS calls Support Categories.

Each of these categories is related to an outcome which reflects the kind of goals and aspirations you may have for your life. Your NDIS Plan will include a dollar amount which you can spend on each of these categories, with much of the money allocated to specific Support Categories.

Some of the category names may sound a bit vague, and sometimes they cover expenses you wouldn't have thought of, so it's great to get an idea of what each category covers. They can also be a good reference for you as you start to think about what you want to achieve, and what supports might assist you.

On the following pages, you'll find a brief explanation of each funding type and Support Category.

If you are unsure of what each category covers, or where your particular supports will fit, ask your Local Area Coordinator or give our team a call on **1300 333 700** to double-check.

Reasonable and necessary

Your NDIS plan will only include supports that the NDIS considers to be 'reasonable and necessary'. For an explanation how the NDIS determines this, see [page 3](#)

Do you want to see an example of an NDIS plan? [Find one here](#)

Type 1: Core Supports

Core funding is intended for fundamental supports that enable you to live your daily life. This funding is quite flexible, so you can choose to spend your money on any of the four categories listed below, but you can't use these funds for things that are covered by the other two funding types.

1.01 Assistance with Daily Living is designed to help you be as independent as possible. It covers support with household, personal care and domestic tasks. This includes things like meal preparation and delivery, cleaning or garden maintenance, or assistance with showering or dressing. Respite care also comes under this category.

1.02 Transport Allowance may be available to you if you can't access public transport because of your disability, so that you can access the supports you need outside your home. Usually paid as a fortnightly allowance, it helps cover the cost of transport that suits your needs.

1.03 Consumables is for the supplies you use every day and that you need because of your disability. It's helpful to think of these as 'off the shelf' purchases. This category covers things like HEN products, continence products, colostomy bags and dressing aids, but doesn't cover your daily medication or things like iPads.

1.04 Assistance with Social & Community Participation provides support for you to participate in community, social and recreational activities. The cost of the actual activity is rarely covered but you can ask for funding to get the support you need to participate. So, for instance, concert tickets or entry to your local swimming pool may not be covered, but you may be able to get funds for a translator or a support person to help you with access.

Type 2: Capital Supports

The funding type 'Capital Supports' is best thought of as the more significant, 'one off' investments in specific items, equipment, accommodation or home modifications you might need to support you in your daily living. This funding is not flexible – you will get funds for a specific purpose, and that's what you must spend the money on. Two categories fall under Capital Supports:

2.05 Assistive Technology is technology or equipment which assists you in your daily life and achieving your goals. This covers things like wheelchairs, prosthetics and orthotics, portable hoists, vehicle modifications, braille resources and even guide dogs.

2.06 Home Modifications and Specialised Disability Accommodation is funding for accommodation, or modifications to your accommodation which allow you to be more independent in your daily life. It may provide funding for things like rails or ramps in your home, or for residing in a Specialist Disability Accommodation (SDA) registered accommodation.

Type 3: Capacity Building Supports

This type of funding is designed to support you in becoming more independent. It covers things that will help you build life skills, enjoy more social or community engagement, or find and keep a job. There are nine Support Categories in this area below. You can't move budget from one category to another, but you can spend the money on any services covered by the category for which the funds were allocated.

3.07 Support Coordination will help you put your plan into action by helping you find and connect with service providers who are the best fit for your situation. Plan Partners provides Support Coordination and you can find out more about this useful support here.

3.08 Improved Living Arrangements is designed to support you in finding, securing or retaining accommodation that is suitable for you. This can include anything from going to inspections, finding appropriate group homes, helping with your transition to more independent living, or negotiating contracts for tenancy or residence.

3.09 Increased Social & Community Participation is designed to help you acquire the skills you need to participate more fully in the community. This category includes things like funding for study, life skills training, sports coaching or training that you need for employment.

3.10 Finding and Keeping a Job is funding for support to enable you to successfully get, or keep, a job. It covers things like assistance with preparing a resume or support with interviews, through to preparing for school-to-work transition, or getting back into the workforce after a period away.

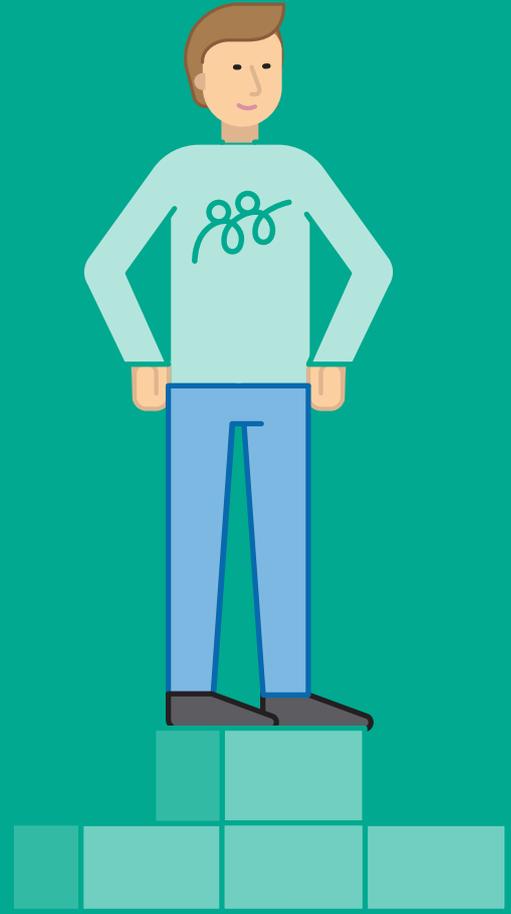
3.11 Improved Relationships is for support that can help you make positive changes to your thinking or behaviour that can help you achieve your potential in life and relationships. It includes funding for services like psychology and behavioural therapy.

3.12 Improved Health and Wellbeing is funding for activities which help you support, maintain or increase your physical mobility or wellbeing. It covers a whole range of things, from dietitians and exercise physiologists to personal trainers.

3.13 Improved Learning is funding to help you make the transition from school to further education. It might provide you with advice, assistance with the application process, or support through the orientation process.

3.14 Improved Life Choices is a broad category which is designed to help you manage your NDIS supports. It includes support to help you build your financial or organisational skills and also includes Plan Management, a service to help you manage the paperwork and admin related to your NDIS Plan. Read more about Plan Management here.

3.15 Improved Daily Living is designed to help you develop basic skills you need to get more from your day-to-day life. It includes funding things like physio and OT, speech therapy and also things like early childhood intervention strategies and some group therapy.



Step 4: Organising your NDIS finances

The NDIS is designed to give you more choice. That includes choosing who manages your NDIS plan and how it's managed. You can choose to manage your funds yourself (Self-Managed), to let the NDIS manage your funds (NDIS-Managed) or to use a Plan Manager like Plan Partners to assist (Plan-Managed).

Here's a summary of the three options and what support they will offer you. You can find more detail on our website by following this [link](#) or reading this [blog](#).

	Plan Partners	NDIS Managed	Self Managed
Manage your invoices and make sure your providers are paid	✓	✓	✗
Allow you to use registered and non-registered providers	✓	✗	✓
Manage your service agreements	✓	✗	✗
Keep track of your budgets	✓	✗	✗
24/7 access to your own online dashboard to track your spending and status of invoices	✓	✗	✗
Monthly funding overviews	✓	✗	✗
Advise you on how to find service providers	✓	✗	✗
Support Coordination (if included in NDIS plan): finding and connecting you with service providers	✓	✗	✗
Advice for your service providers on how to invoice and work under the NDIS	✓	✗	✗
Independent advice and expertise through every step of your NDIS journey	✓	✗	✗

Plan Management

Out of the three fund management options, many people choose Plan Management because it offers the most choice and flexibility, saves time, and makes managing NDIS funds easy. With Plan Partners, you can also relax knowing you'll have an independent NDIS expert by your side throughout your NDIS journey.

Choosing **Plan Partners** as your plan manager can:

- Give you more choices, with access to both NDIS registered and non-registered service providers (more on the two here).
- Reduce your administrative burden by managing the paperwork and ensuring your providers are paid.
- Keep track of your spending and report regularly on your progress with monthly funding overviews and your own personal online dashboard.
- Answer your questions with plenty of online resources and the assistance of our friendly customer service team.

While we can provide you with a list of service providers in your area, Plan Management doesn't help you actively find or connect with them. If you need more support in finding the right service providers for your situation, Support Coordination might be right for you.

Plan Management is available to everyone who receives funding through the NDIS, and it can be fully funded under the NDIS so there's no cost to you. Just ask for it to be included in your plan – you'll find it under the category called 'Improved Life Choices'.

If you'd like to find out more about Plan Management and how it can make your NDIS journey easier, have a look at one of our inspiring customer stories here.

If you already have Plan Management in your NDIS Plan, and would like to talk to us about how Plan Partners can support you, please give us a call on 1300 333 700 or contact us.

You can also easily sign up for Plan Management with Plan Partners here.



Step 5: Organising your Supports

One of the great things about the NDIS is that it gives you the opportunity to choose your own providers for the services you need, giving you more freedom, flexibility and control.

For many people, organising their own supports is a welcome change - but finding the perfect service provider can be a daunting task. So how do you go about finding the right supports for you?

Support Coordination

The NDIS can include 'Support Coordination' in your plan, which means you can get a professional Support Coordinator to help you better understand your NDIS plan and find and connect you with service providers that are the best fit for your situation.

Support Coordination can be funded by the NDIS, but you will need to request it during your planning meeting. Unlike Plan

Management, not everyone is eligible to have Support Coordination included in your plan.

You can read more about Support Coordination, eligibility criteria, and how it can help you put your plan into action in [this blog](#). If you think you would benefit from this type of support, make sure you ask your Local Area Coordinator about eligibility and how to apply when you are planning or reviewing your plan.

If you choose Plan Partners as your Support Coordinator, we will:

- Find and connect you with local providers that fit your needs, goals and plan budget.
- Work with you to help you understand the details of your plan and what support you can access.
- Reduce administration by setting up service agreements with your providers.
- Advise and guide you and help resolve any issues with providers throughout your NDIS journey.

Our Support Coordination team are passionate experts in the disability sector. They understand the NDIS and can draw on a huge network of service providers, both NDIS registered and non-registered, all around the country.

The Plan Partners Support Coordination team will work with you to determine your specific needs and goals. Then, with your plan budget and priorities in mind, we will find service providers in your area who are a good fit for your specific situation and then help you connect with them.

You can choose the service providers you want to help you maximise the benefits of your NDIS plan. If you already have service providers for some supports, we can also set up an NDIS service agreement with them, so you can continue to work with the people you know and trust.

If you'd like to find out more about Support Coordination and how it can make your NDIS journey easier, have a look at one of our inspiring customer stories [here](#).

If you already have Support Coordination in your NDIS Plan and would like to talk to us about how we can support you, please give us a call on 1300 333 700.

You can also easily sign up for Support Coordination with Plan Partners [here](#).

If the NDIS doesn't give you funding for Support Coordination, there are still some avenues you can go down to get assistance.

Ask your Local Area Coordinator

If you don't have Support Coordination in your plan, your Local Area Coordinator (LAC) should be the first one to go to when you need support with finding service providers. Your LAC can supply you with a list of service providers in your area to get your plan started.

Ask your Plan Manager

There are many benefits of [Plan Management](#) - one of which is that some Plan Managers (such as Plan Partners) can provide you with advice on how to best find service providers in your area. At Plan Partners, we have a large network of service providers all around Australia and extensive knowledge of what supports are available in local communities throughout the country.

Making Use of Directories

The NDIS Portal contains lists of service providers, but it can be easy to lose your way as you navigate through thousands of providers.

Luckily, there are some websites that can help you sort through the sea of providers and remove some of the mystery and confusion

Setting up service agreements

If you have found the right service providers for you, make sure to set up service agreements with your service providers to confirm when and how the support will be provided, and what costs and fees you may need to pay. Make sure you're happy with the agreements before you sign them. This protects both you and the service provider, should any disputes arise in future.

For more information, check the [NDIS website](#).

around the supports on offer. Directories such as [Clickability](#) and [MyCareSpace](#) provide overviews of each service provider, including handy ratings and customer reviews to give you a sense of how others have found their experience. You can even review service providers yourselves - perfect for complimenting a service provider for delivering a great service...or sharing a bad experience as a warning to others.

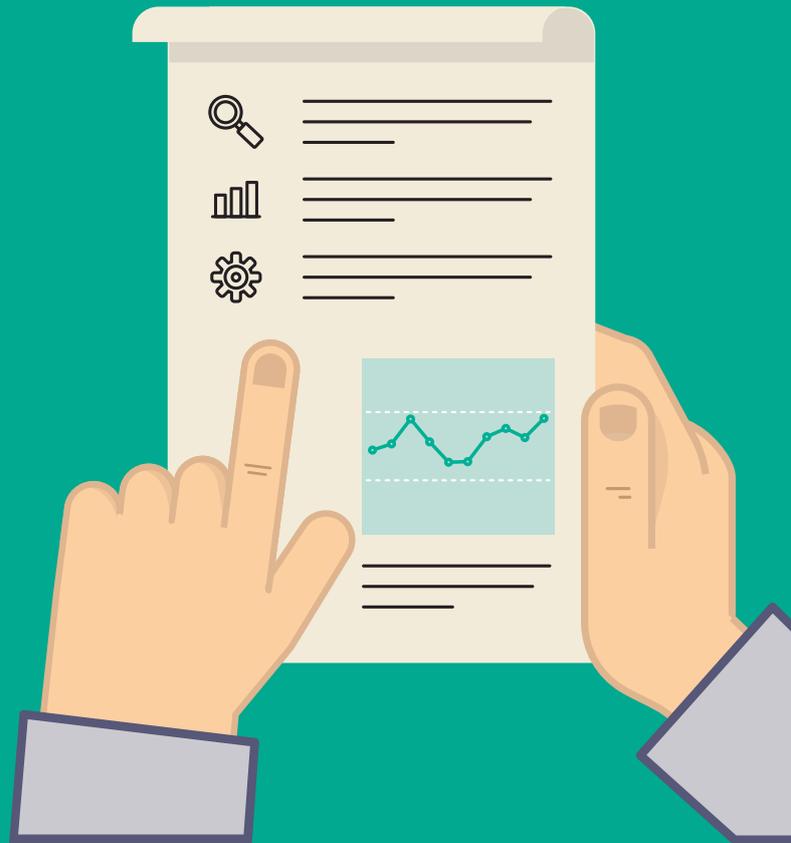
Organising your team

Some people like to organise their own team of supports and hire support workers themselves, instead of through a service provider. There are several organisations, that can help you facilitate this, such as:

- [Mable](#) (formerly Better Caring)
- [Hire Up](#)
- [Home Care Heroes](#)

Read profiles of support workers on their websites and choose the person you think would fit your needs best. While this is pretty hands-on, some people really enjoy having that additional level of control. Again, it all depends on your situation and what you feel comfortable with.

Step 6: Track the progress of your plan

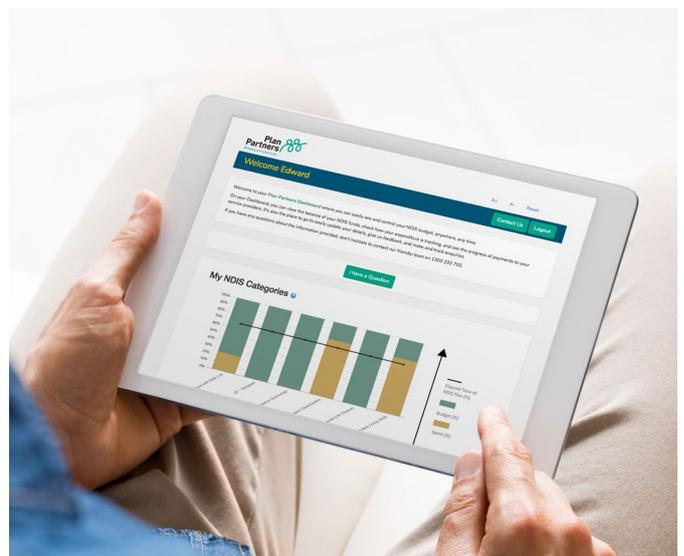


Now you've got the planning and organisation of your NDIS plan out of the way, you can start putting your plan into action and receiving your supports. But that doesn't mean there's no more work to be done, as you'll still need to keep a record of all the supports you receive and track your NDIS budget.

If you choose Plan Management with Plan Partners, we can help lighten your load by taking care of this. To save you time and make it easier for you to get the most from your plan, we've introduced an online Plan Partners Dashboard that makes it simple to keep an eye on your NDIS budgets and how they're being spent.

Just log in to your Dashboard via the Plan Partners website to view the balance of your NDIS funds, see how much you've spent and what money you have left, and monitor the progress of payments to your service providers.

Your Dashboard also allows you to quickly and easily update your details, send us your feedback, and make and track enquiries. It's easily accessible from computers, tablets and phones, so you can jump on anywhere, anytime.



Here's what you'll see when you log into your Plan Partners Dashboard

My NDIS categories

This graph gives you an overview of your NDIS money at a glance. You can see what categories your funds have been allocated to, how much you've used, and how much is left. Point to any place on the graph to see the exact percentages.

My service providers

This table states which service providers are active. You can also provide feedback about the provider and request to delete them.

My details

This features your contact details. You can easily change your details here.

Enquiry history

This is an overview of the enquiries you have sent through your dashboard.

Plan Partners
Bringing your plan to life

Welcome Edward [Contact Us](#) [Logout](#)

Welcome to your Plan Partners Dashboard where you can easily see and control your NDIS budget, anywhere, any time.
On your Dashboard, you can view the balance of your NDIS funds, check how your expenditure is tracking, and see the progress of payments to your service providers. It's also the place to go to easily update your details, give us feedback, and make and track enquiries.
If you have any questions about the information provided, don't hesitate to contact our friendly team on 1300 333 700.

[I have a Question](#)

My NDIS Categories

This graph gives you an overview of your NDIS money at a glance. You can see what categories your funds have been allocated to, how much you've used, and how much is left. Point to any place on the graph to see the exact percentages, or have a look at the chart 'My NDIS Categories' below to see the same information in dollar amounts. Please be aware that any payments which have not yet been processed by the NDIS won't be included in these figures. Funding for categories 01, 02, 03 and 04 are so-called Core Supports and are flexible. So funds from one category can be used for another in the event of an overspend.

Category	Elapsed Time of NDIS Plan (%)	Budget (K)	Spent (%)
01 - Assistance with self-care	~80%	~80%	~20%
02 - Transport	~80%	~80%	~0%
03 - Assistance with household	~80%	~80%	~0%
04 - Support Coordination	~80%	~80%	~80%
11 - Transport Life Cycle	~80%	~80%	~0%
12 - Transport Daily Living Cycle	~80%	~80%	~80%

My Service Providers

Name	Email	Phone	Feedback	Cancel
Sean's Example Physio Service	info@seansphysiotherapy.com.au	0429638984	Feedback	Delete
Plan Partners			Feedback	Delete
Even Better Example Company BV	evenbetterexample@example.com.au		Feedback	Delete

[New](#)

My Details

First Name	Edward
Last Name	Example
Address Street	1 Example Street
Address Suburb	Example Town
Address State	VIC
Address Postcode	3000
Mobile	
Phone	04689002255
Email	edward@example.com
Preferred Contact Method	Email
Marketing	Subscribed

[Edit](#)

Enquiry History

Case Number	Subject	Date	Status
00012833	I would like to add a new Service Provider	24/08/2018	Closed
00012832	I have a question	24/08/2018	Closed
00012831	I have a question	24/08/2018	Closed
00012723	I have a question	23/08/2018	Closed

[View More](#)

My invoices

This table displays the status of the invoices of your service providers, including the dates when Plan Partners has commenced processing and when the NDIS has approved or declined the invoice.

My Invoices

Invoice Number	Service Provider	Invoice Amount	Invoice Date	Processing Commenced	NDIS Approved	Invalid / NDIS Rejected	Paid
EXAMPLE123658	Sean's Example Physio Service	\$ 3,701.92	17/09/2018				
EXAMPLE56789	Even Better Example Company BV	\$ 520.00	13/09/2018	14/09/2018			
EXAMPLE12345	Even Better Example Company BV	\$ 3,361.40	04/09/2018	05/09/2018	10/09/2018		
54481	Sean's Example Physio Service	\$ 0.00	31/08/2018				
123	Even Better Example Company BV	\$ 105.00	27/08/2018				

[View More](#)

My services with Plan Partners

This states what services of Plan partners you currently receive and who your main contact with Plan Partners is.

My Services with Plan Partners

I have Plan Management	Yes
I have Support Coordination	Yes
My Contact with Plan Partners	Marissa Fowler

My NDIS Categories

This table is a more detailed version of the graph on top. It states exactly how much money you have left in each support category.

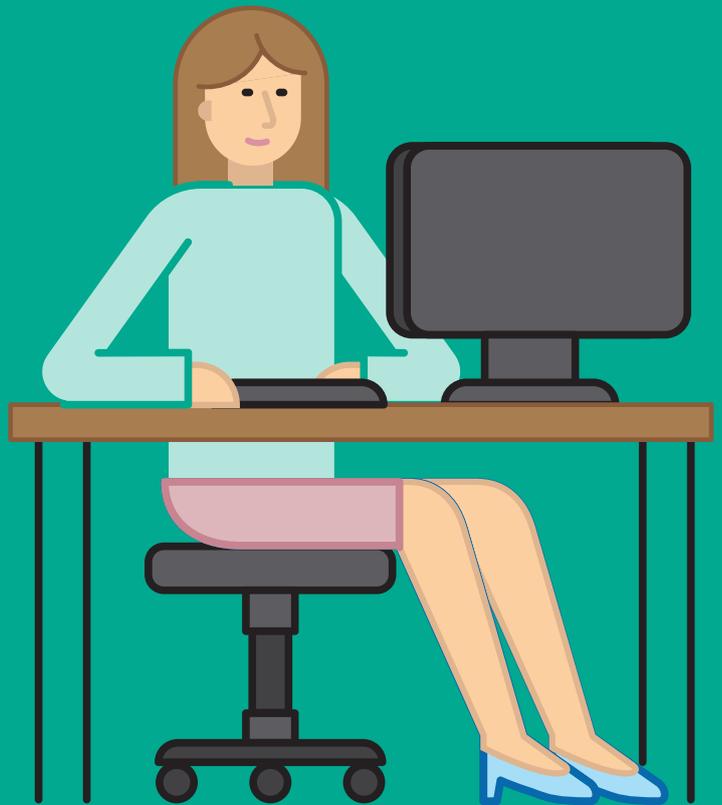
My NDIS Categories

Name	Used (\$)	Remaining (\$)	Used (%)	Elapsed Time (%)	Status
01 - Assistance with self care	\$ 6,043.15	\$ 18,956.85	24%	81%	Under
02 - Transport	\$ 0.00	\$ 6,531.00	0%	81%	Under
05 - Assistive Technology	\$ 0.00	\$ 750.00	0%	01%	Under
07 - Support Coordination	\$ 3,361.40	\$ 1,067.56	76%	81%	Under
14 - Improved Life Choices	\$ 0.00	\$ 4,290.49	0%	81%	Under
15 - Improved Daily Living Skills	\$ 3,701.92	\$ 1,298.08	74%	81%	Under

Please be aware that any payments which have not yet been processed by the NDIS won't be included in these figures.

Funding for categories 01, 02, 03 and 04 are so-called Core Supports and are flexible. So funds from one category can be used for another in the event of an overspend.

Step 7: Your annual plan review



Normally, an NDIS plan covers a 12-month period – although there are some rare exceptions, which can range from 3 months to 2 years. Most NDIS participants get to review their plan each year. That’s your chance to update your goals, ask for changes to your plan, and give feedback to your Local Area Coordinator about how your NDIS plan is working for you.

Whether your condition or living situation has changed, you require additional services, or you have some new life goals you’d like to achieve, the annual plan review is your perfect chance to tailor your NDIS plan for the upcoming year.

You will do this in a meeting with your Local Area Coordinator. Just like your first meeting, it’s important to prepare well to make the most of this opportunity.

- Think about what you’d like to talk about in the meeting.
- Make a list of anything you’d like to change and why.
- Be specific about your needs. Remember that if you still need a service, including Plan Management or Support Coordination, you need to ask for these things as they won’t be included unless you ask and can explain why you need them.

Read more about your annual review [here](#).

Rachel Capps, one of Plan Partners customers, provides some inside advice in [this blog](#).

Why Plan Partners?

Putting your NDIS Plan into action is exciting, but it can also be a bit overwhelming. Plan Partners can provide support to help you bring your NDIS plan to life, so you can focus on living the life you want.

Plan Partners is passionate about empowering people with a disability to realise their potential and achieve their goals. We have the knowledge, resources and commitment to partner with you, at every stage of your NDIS journey.

Plan Partners offers two services which can help you bring your NDIS plan to life:

- **Plan Management** – managing your NDIS funds and taking care of time-consuming, tricky paperwork
- **Support Coordination** – helping you identify and connect with the best supports to suit your situation

Here's what makes us different:

- **Our commitment to you, as outlined in our Customer Charter.** We will listen to you and understand your needs, while ensuring you're always in control and making all the decisions.
- **Expertise:** We have a deep knowledge of the NDIS, strong financial expertise, and years of experience in the disability sector.
- **Choice:** More choice with an extensive national network of service providers and deep local knowledge to help you choose the right supports for your situation.
- **Independence:** We don't take payments from anyone else, so you can be sure that what drives you, drives us.
- **Accessibility:** We keep your information at hand and so we can move quickly when you contact us. Our friendly team is always ready to answer your questions quickly, and you can check your plan any time using our online Plan Partners Dashboard.

Want to know more? Visit our website or call our friendly team on 1300 333 700.

Our Customer Charter

What we promise, we deliver.



1. You can always see and control how your budget is tracking.

You can see exactly how your budget is tracking at any time. You are always in control.

Each month we will send you a statement showing how your NDIS budgets are tracking. You can also see your funding details whenever you like by logging in to your personal dashboard on our website.



2. We welcome all your questions and feedback. We respond to you quickly, consistently and fairly.

You can contact us over the phone, by email or by writing to us. We will endeavor to get back to you within 2 working days and be consistent and fair in the way we respond.



3. We make sure your service providers are paid promptly.

You don't need to worry about your service providers being paid. As we process invoices promptly, they usually get paid within 10 working days.



4. We give you more choice of service providers.

We have a large list of NDIS registered and non-registered service providers. We are always adding to it and making sure it is correct. We talk to our customers to find out what they like and don't like about their service providers, and we use that information to build a better network for you.



5. When you need us, we will move quickly and always put you first.

We keep your information at hand so we can move quickly when you contact us and focus on what you need. If our customer service team can't help you, your enquiry will be directed to a State Manager.

Our aim is to keep our customers happy. At least once a year, we will ask you how we are doing in a survey. We will use your feedback to improve what we do.



6. We are independent and only work for you.

We only consider your needs when we advise you on how to spend your funds or select your providers. We don't take payments from anyone else or provide NDIS-funded services other than Plan Management and Support Coordination. We will also handle your personal information with care, in accordance with our Privacy Policy. You can find a copy of this policy on our website.

Every year, we are audited, so you can be sure we stay independent and unbiased.



7. Our people are well trained and informed.

You can count on us to have a deep and up-to-date knowledge of the NDIS, the disability community, Plan Management and Support Coordination.

All our people spend at least 20 hours each year learning and developing their skills through professional development. We also encourage our people to volunteer. We offer them 2 days extra paid leave each year to volunteer in the disability community.



8. We are committed to making the NDIS a success.

We are always talking to and working with members of the disability community, the NDIA and the government to make the NDIS a success.

We will share our knowledge of the NDIS by taking part in at least 10 industry expos and events each year and publishing at least 2 articles each month to help educate people about how to make the most of the NDIS.

**If you'd like to find more about
how we can support you,
please contact our friendly team.**

 **planpartners.com.au**

 **info@planpartners.com.au**

 **1300 333 700**