Support organiser

This user guide explains how to use the Support Organiser spreadsheet. It has screen shots, so we have also created a version that is suitable for screen readers.

Many NDIS participants have approved funding for different supports. You can use the support organiser to help you make the best use of your funding to pursue your plan goals. It aims to help you stay within the amount of NDIS funding you have.

This user guide works through some examples on how to enter information into the support organiser. You can put your own information into the examples to see how the support organiser works, then download and use the support organiser to keep track of your supports.

Disclaimer:

The estimates calculated by the Support Organiser are indicative only and are based on the information you enter at the time.

You should not rely on the amounts calculated by the Support Organiser and the National Disability Insurance Agency (NDIA) gives no warranty as to relevance, accuracy, currency or completeness of any calculation.

The NDIA is not responsible for any loss or damage you may suffer as a result of relying on a calculation from the Support Organiser.

The NDIA does not use the Support Organiser for the calculations of reasonable and necessary supports.

If you have any questions about the Support Organiser, please use the feedback form at the bottom of this page or through Contacts on myplan.ndis.gov.au or call the NDIA on 1800 800 110.

Notes for Excel

Spreadsheets

There are three spreadsheets. You can switch between the spreadsheets by clicking on the tabs at the bottom left-hand side of the spreadsheet or by pressing Control + Page up or Control + Page Down.

Read Me First has notes about the support organiser. Please make sure you read and understand these notes before using the support organiser.

The support organiser has the tables that you need to fill in to calculate your planned spending.

Data has the details to make the support organiser work. You don't need to open this spreadsheet.

Understanding the Support Organiser spreadsheet

This spreadsheet is divided into Core Supports (services and consumables) and Capacity Building Supports (services).

Headings that end with a # show which columns you will need to enter information in.

Teal coloured cells are where you need to type in your information.

Grey coloured cells are where Excel will automatically calculate totals for you. These cells have formulas. Don't enter data here or delete the contents. If you do, select the Undo button to reset it.

Troubleshooting tips

Automatic calculation function

When you put in your information, the totals in the grey boxes should update. If they don't, the automatic calculation function may be turned off. You can press F9 to update the calculations.

You can check if the automatic calculation function is turned off by going to the Formulas tab and selecting Calculation Options on the right-hand side of the toolbar. If Manual is ticked, select Automatic.

You can also use the following keystrokes:

F10 – this gives all shortcuts and headings either a number or a letter

M – to get the Formulas tab

X – to select Calculation Options

A – to choose Automatic

Formulas

If you type over a formula, you can select Undo to get the formula back.

If a formula isn't working, you can download the spreadsheet again from the NDIS website (link to support organiser) and copy your details from the teal-coloured sections (or the sections under the headings marked with #) into the downloaded spreadsheet.

Examples

There are two examples after the section explanations to help you understand how to enter information into the support organiser spreadsheet.
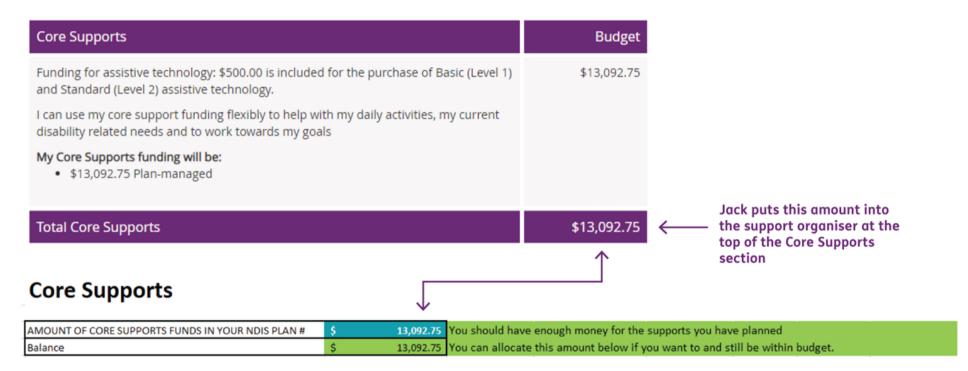
Example 1: Jack's Core Supports funding

(Note: these examples are made up)

To put his information into the support organiser, Jack needs to know how much funding he has in Core Supports. Jack looks at his NDIS plan in the myplace portal and finds the Total Core Supports funding amount of $13,092.75. In this example, the Total Core Supports amount is for one year of funding.

Jack enters this amount into the top of the Core Supports section in the support organiser spreadsheet. This is shown on the next page.

Core Supports	Budget
Funding for assistive technology: $500.00 is included for the purchase of Basic (Level 1) and Standard (Level 2) assistive technology. I can use my core support funding flexibly to help with my daily activities, my current disability related needs and to work towards my goals **My Core Supports funding will be:** • $13,092.75 Plan-managed	$13,092.75
Total Core Supports	**$13,092.75**

Jack puts this amount into the support organiser at the top of the Core Supports section

Core Supports

AMOUNT OF CORE SUPPORTS FUNDS IN YOUR NDIS PLAN #	$	13,092.75	You should have enough money for the supports you have planned
Balance	$	13,092.75	You can allocate this amount below if you want to and still be within budget.

Jack decides that he wants to use his Core Supports funding in the following way:

- Support workers during the week and some Saturdays
- The provider charges a one-time only establishment fee
- His plan also includes $500 for low-cost assistive technology.

Jack can type this information into the teal cells (rows 8 to 17, columns A to F) in the support organiser spreadsheet.

First support: Jack wants support workers during the week.

He enters 3 sessions every week (Monday to Friday), 1 hour per session and a cost of $57.10 per hour (on row 8, columns A to F). The spreadsheet automatically works out the cost per session ($57.10) and annual amount ($8,907.60) displayed in cells row 8, columns G and H.

After Jack puts in the first support, the total annual amount adds up to $8,907.60 displayed in row 18, column H. From the total funding in the plan ($13,092.75), there is now a balance of $4,185.15 (row 5, column B). This is shown on the next page.

Core Supports

This shows what funding is left after Jack has put in the first line of supports

This is how much funding Jack has in his plan

AMOUNT OF CORE SUPPORTS FUNDS IN YOUR NDIS PLAN #	$	13,092.75	You should have enough money for the supports you have planned
Balance	$	4,185.15	You can allocate this amount below if you want to and still be within budget.

Services you might need # - You need to know what types of supports you need and enter a description that is meaningful to you	Number of sessions # - is the number of times you need something *Example: If service frequency is 3 times a day, enter "3"*	Number of units of time #- is frequency of what is needed *Example: If service frequency is everyday, enter "1".*	Unit of time # - is asking will you use this service every day, week, fortnight, month, once only. This is a drop down list. *Example: If service frequency is every fortnight select "week" and enter 2 in the previous column to represent two weeks.*	How many hours is each session? # - is how long is each time you use the service. Example: if your appointment is for 2 hours, enter "2"	Cost per hour #	Cost per session	Annual amount *Total cost over a full year*
Support worker - daytime weekday (3 sessions per week)	3	1	Week	1	$ 57.10	$ 57.10	$ 8,907.60

↑ | ↑ | ↑ | ↑ | ↑ | ↑

Jack types in a description of what support he wants — **he wants 3 sessions** — **every** — **week** — **for 1 hour** — **cost per hour**

When Jack has finished entering all of the information in at least one row, these grey cells will automatically calculate the total amount. This amount will update if Jack enters information in more rows

TOTAL CORE SERVICES	A	$ 8,907.60

Second support: Jack wants a support worker on a Saturday night once a month.

He enters 1 session, 1 time a month, for 3 hours and a cost of $80.10 per hour (on row 9, columns B to F).

The spreadsheet automatically works out the cost per session ($240.30) and annual amount ($2,883.60) displayed in cells row 9, columns G and H.

After Jack puts in the second support, the total annual amount adds up to $11,791.20 displayed in row 18, column H. From the total funding in the plan ($13,092.75), there is now a balance of $1,301.55 (row 5, column B). This is shown on the next .

Core Supports

This shows what funding is left after Jack has put in the second line of supports

AMOUNT OF CORE SUPPORTS FUNDS IN YOUR NDIS PLAN #	$ 13,092.75	You should have enough money for the supports you have planned
Balance	$ 1,301.55	You can allocate this amount below if you want to and still be within budget.

Services you might need # - You need to know what types of supports you need and enter a description that is meaningful to you	Number of sessions # - is the number of times you need something *Example: If service frequency is 3 times a day, enter "3"*	Number of units of time #- is frequency of what is needed *Example: If service frequency is everyday, enter "1".*	Unit of time # - is asking will you use this service every day, week, fortnight, month, once only. This is a drop down list. *Example: If service frequency is every fortnight select "week" and enter 2 in the previous column to represent two weeks.*	How many hours is each session? # - is how long is each time you use the service. *Example: if your appointment is for 2 hours, enter "2"*	Cost per hour #	Cost per session	Annual amount *Total cost over a full year*
Support worker - daytime weekday (3 sessions per week)	3	1	Week	1	$ 57.10	$ 57.10	$ 8,907.60
Support worker - Saturday night (1 time a month)	1	1	Month	3	$ 80.10	$ 240.30	$ 2,883.60

↑ Jack types in a description of what support he wants   ↑ he wants 1 session   ↑ every   ↑ month   ↑ for 3 hours   ↑ cost per hour

When Jack has finished entering all of the information in at least one row, these grey cells will automatically calculate the total amount. This amount will update if Jack enters information in more rows

TOTAL CORE SERVICES						A	$ 11,791.20

Third support: Jack's provider charges a once off establishment fee of $571.00.

Jack notes this as a one-time cost for the year. If his plan is longer than 1 year, this cost isn't repeated.

He enters 1 session, 1 time a year, for 1 hour and a cost of $571.00 per hour (on row 10, columns B to F). The spreadsheet automatically works out the cost per session ($571.00) and annual amount ($571.00) displayed in cells row 10, columns G and H.

After Jack puts in the third support, the total annual amount adds up to $12,862.20 displayed in row 18, column H. From the total funding in the plan ($13,092.75), there is now a balance of $730.55 (row 5, column B). This is shown on the next .

Jack now goes to the consumables part of his plan. If you have no consumables, then skip this step.

Core Supports

AMOUNT OF CORE SUPPORTS FUNDS IN YOUR NDIS PLAN #	$ 13,092.75	You should have enough money for the supports you have planned
Balance	$ 730.55	You can allocate this amount below if you want to and still be within budget.

Services you might need # - You need to know what types of supports you need and enter a description that is meaningful to you	Number of sessions # - is the number of times you need something *Example: If service frequency is 3 times a day, enter "3"*	Number of units of time #- is frequency of what is needed *Example: If service frequency is everyday, enter "1".*	Unit of time # - is asking will you use this service every day, week, fortnight, month, once only. This is a drop down list. *Example: If service frequency is every fortnight select "week" and enter 2 in the previous column to represent two weeks.*	How many hours is each session? # - is how long is each time you use the service. *Example: if your appointment is for 2 hours, enter "2"*	Cost per hour #	Cost per session	Annual amount *Total cost over a full year*
Support worker - daytime weekday (3 sessions per week)	3	1	Week	1	$ 57.10	$ 57.10	$ 8,907.60
Support worker - Saturday night (1 time a month)	1	1	Month	3	$ 80.10	$ 240.30	$ 2,883.60
Establishment fee (1 time only)	1	1	Year	1	$ 571.00	$ 571.00	$ 571.00

Jack types in what the service is   it is 1 time only   1 time   for the year   1 time   cost

When Jack has finished entering all of the information in at least one row, these grey cells will automatically calculate the total amount. This amount will update if Jack enters information in more rows

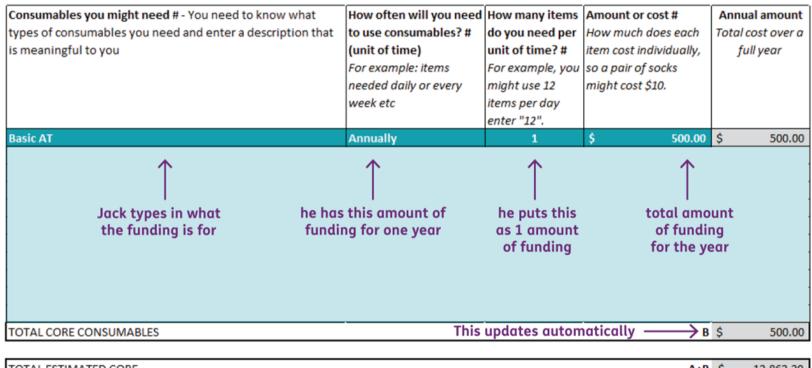|	
TOTAL CORE SERVICES	A $ 12,362.20

Consumables support: Jack has funding of $500.00 for basic assistive technology, or assistive technology.

Jack doesn't know the prices of all the items he wants yet. He can put the full amount of $500 for now. Later, when he has the prices, he can update this information with the details of how he will spend the $500.

In row 21, columns A to D, he enters this information, and the spreadsheet automatically works out the annual amount displayed in row 21, column E ($500.00).

After Jack puts in the consumables support, the total annual amount for consumables adds up to $500.00 displayed in row 32, column E. This is shown on the next .

Jack now looks at his total Core Supports.

Consumables you might need # - You need to know what types of consumables you need and enter a description that is meaningful to you	How often will you need to use consumables? # (unit of time) For example: items needed daily or every week etc	How many items do you need per unit of time? # For example, you might use 12 items per day enter "12".	Amount or cost # How much does each item cost individually, so a pair of socks might cost $10.	Annual amount Total cost over a full year
Basic AT	Annually	1	$ 500.00	$ 500.00

Jack types in what the funding is for → (column 1)

he has this amount of funding for one year → (column 2)

he puts this as 1 amount of funding → (column 3)

total amount of funding for the year → (column 4)

TOTAL CORE CONSUMABLES This updates automatically → B	$ 500.00

TOTAL ESTIMATED CORE A+B	$ 12,862.20

This adds the totals from the first table and this table, and updates automatically →

Jack has put supports in the first table that add up to $12,362.20. Jack has put supports in the second table for $500. Adding these together, Jack's supports total $12,862.20

Jack's total supports

After putting in all the details, Jack can look at the top of the Core Supports section to see whether he has enough funds to cover everything he has entered.

In this example, he will have enough funds to cover all his planned supports (displayed in row 4, column B). He also has $230.55 left over (displayed in row 5, column B), and he can allocate this to a support if he wants to.

Core Supports

AMOUNT OF CORE SUPPORTS FUNDS IN YOUR NDIS PLAN #	$	13,092.75	You should have enough money for the supports you have planned
Balance	$	230.55	You can allocate this amount below if you want to and still be within budget.

The balance is what Jack has left over – his plan funding is $13,092.75 and he has put in supports that add up to $12,862.20

Jack is likely to stay within his plan budget

Example 2: Awaisha's Capacity Building Supports funding

(Note: these examples are made up)

To put her information into the support organiser, Awaisha needs to know how much funding she has in Capacity Building.

She looks at her NDIS plan in the myplace portal and finds the Total Capacity Building Supports funding amount of $11,704.84. In this example, the Total Capacity Building Supports amount is for one year of funding.

Awaisha enters this amount into the top of the Capacity Building Supports section (row 38, column B) in the support organiser spreadsheet. This is shown on the next .

Awaisha's plan includes:
- Funding of $1,454.98 that is for a Stated Support and can only be used for plan management
- Improved Daily Living funding of $10,249.95 for her therapies, and decides she wants to spend her funding as follows:
  - Speech therapy – 1 session 1 time a month (monthly), for 2 hours
  - Occupational Therapy (OT) – 1 session every 2 months, for 2.5 hours (2½ hours)
  - Psychology – 6 sessions in 1 year, for 1 hour (first 6 months of the year only)
  - A support worker to help learn new cooking skills (working towards independence) – 1 session 1 time a week, for 1 hour.

The next pages show how Awaisha puts this information into the Capacity Building Supports section of the support organiser spreadsheet.

Capacity Building Supports	Budget

Improved Life Choices (CB Choice & Control)
Support to set-up, develop and process monthly statements (administrative functions only)
 	
My Stated Supports funding will be:
• $227.53 NDIA-managed
  Plan Management And Financial Capacity Building - Set Up Costs
 	
• $1,227.36 NDIA-managed
  Plan Management - Financial Administration
	$1,454.89

Improved Daily Living (CB Daily Activity) Supports to assist me to achieve my goal of Improving my social skills, emotional regulation and to maintain my health and wellbeing. **My Improved Daily Living funding will be:** • $10,249.95 Plan-managed	$10,249.95
Total Capacity Building Supports	**$11,704.84**

Awaisha puts this amount into the support organiser at the top of the Capacity Building section

Capacity Building

AMOUNT OF CAPACITY BUILDING FUNDS IN YOUR NDIS PLAN #	$	11,704.84	You should have enough money for the supports you have planned.
Balance	$	11,704.84	You can allocate this amount below if you want to and still be within budget.

Awaisha's first capacity building supports plan

Awaisha enters information using the same process as Jack did in the previous example.

She puts the information into the Capacity Building Supports section (rows 42 to 47, columns A to F) of the support organiser spreadsheet. The total is displayed in row 52, column H. This is shown on the next page.

Capacity Building

Services you might need # - You need to know what types of supports you need and enter a description that is meaningful to you	Number of sessions # - is the number of times you need something Example: If service frequency is 3 times a day, enter "3"	Number of units of time #- is frequency of what is needed Example: If service frequency is everyday, enter "1".	Unit of time # - is asking will you use this service every day, week, fortnight, month, once only. This is a drop down list. Example: If service frequency is every fortnight select "week" and enter 2 in the previous column to represent two weeks.	How many hours is each session?# - is how long is each time you use the service. Example: if your appointment is for 2 hours, enter "2"	Cost per hour #	Cost per session	Annual amount Total cost over a full year
Plan management set up (once off cost)	1	1	Year	1	$ 227.53	$ 227.53	$ 227.53
Plan management financial administration (billed monthly)	12	1	Year	1	$ 102.28	$ 102.28	$ 1,227.36
Speech - 1 session 1 time a month (monthly), for 2 hours	1	1	Month	2	$ 180.00	$ 360.00	$ 4,320.00
OT - 1 session every 2 months, for 2.5 hours (2 1/2 hours)	1	2	Month	2.5	$ 190.00	$ 475.00	$ 2,850.00
Psychologist - 6 sessions in 1 year, for 1 hour	6	1	Year	1	$ 150.00	$ 150.00	$ 900.00
Support worker to help learn new cooking skills	1	1	Week	1	$ 50.00	$ 50.00	$ 2,600.00
			Select an option				

↑ Awaisha types in a description of what the service is

↑ how often she wants it

↑ how many times

↑ when she will use it

↑ how long it will be

↑ how much it will cost

Awaisha's second capacity building supports plan:

After putting in all the information, Awaisha can look at the top of the Capacity Building Supports section to see whether she has enough funds to cover everything. In this example, Awaisha will exceed her plan budget by $420.05 (displayed in row 39, column B) with this combination of supports, so she needs to make changes. This is shown on the next .

![ndis logo]

Capacity Building

This shows what funding is left after Awaisha has put in her supports. It is red because Awaisha does not have enough funding for the supports she put in

This is how much funding Awaisha has for her Capacity Building supports

AMOUNT OF CAPACITY BUILDING FUNDS IN YOUR NDIS PLAN #	$ 11,704.84	You do NOT have enough funds. You need to make an adjustment.
Balance	-$ 420.05	You need to reduce your planned spending by this amount to be within budget.

Services you might need # - You need to know what types of supports you need and enter a description that is meaningful to you	Number of sessions # - is the number of times you need something Example: If service frequency is 3 times a day, enter "3"	Number of units of time #- is frequency of what is needed Example: If service frequency is everyday, enter "1".	Unit of time # - is asking will you use this service every day, week, fortnight, month, once only. This is a drop down list. Example: If service frequency is every fortnight select "week" and enter 2 in the previous column to represent two weeks.	How many hours is each session?# - is how long is each time you use the service. Example: if your appointment is for 2 hours, enter "2"	Cost per hour #	Cost per session	Annual amount Total cost over a full year
Plan management set up (once off cost)	1	1	Year	1	$ 227.53	$ 227.53	$ 227.53
Plan management financial administration (billed monthly)	12	1	Year	1	$ 102.28	$ 102.28	$ 1,227.36
Speech - 1 session 1 time a month (monthly), for 2 hours	1	1	Month	2	$ 180.00	$ 360.00	$ 4,320.00
OT - 1 session every 2 months, for 2.5 hours (2 1/2 hours)	1	2	Month	2.5	$ 190.00	$ 475.00	$ 2,850.00
Psychologist - 6 sessions in 1 year, for 1 hour	6	1	Year	1	$ 150.00	$ 150.00	$ 900.00
Support worker to help learn new cooking skills	1	1	Week	1	$ 50.00	$ 50.00	$ 2,600.00

When Awaisha has finished entering all of the information in at least one row, these grey cells will automatically calculate the total amount. This amount updates as Awiasha enters information in more rows

| TOTAL ESTIMATED CAPACITY BUILDING | | | | | | | $ 12,124.89 |

Since Awaisha's first combination of supports exceeded her available plan funds by $420.05 (displayed in row 39, column B), she decides to make the following changes:

- A support worker to help learn new cooking skills (working towards independence):
  - 1 session every 2 weeks (instead of every week)
  - Increase the session from 1 hour to 1.5 hours (1½ hours).

Awaisha updates this information in the Capacity Building section of the support organiser in:

- row 47 column C to change from once a week to once every two weeks
- row 47 column E to change the session time from one hour to one and a half hours.

This changes the total in row 52, column H to $11,474.89 and the balance in row 39, column B becomes $229.95. This is shown on the next .

This shows what funding is left after Awaisha has updated supports in the spreadsheet. It is now green because she has enough funding for the supports she put in

AMOUNT OF CAPACITY BUILDING FUNDS IN YOUR NDIS PLAN #	$ 11,704.84	You should have enough money for the supports you have planned.
Balance	$ 229.95	You can allocate this amount below if you want to and still be within budget.

Services you might need # - You need to know what types of supports you need and enter a description that is meaningful to you	Number of sessions # - is the number of times you need something *Example: If service frequency is 3 times a day, enter "3"*	Number of units of time #- is frequency of what is needed *Example: If service frequency is everyday, enter "1".*	Unit of time # - is asking will you use this service every day, week, fortnight, month, once only. This is a drop down list. *Example: If service frequency is every fortnight select "week" and enter 2 in the previous column to represent two weeks.*	How many hours is each session?# - is how long is each time you use the service. Example: if your appointment is for 2 hours, enter "2"	Cost per hour #	Cost per session	Annual amount *Total cost over a full year*
Plan management set up (once off cost)	1	1	Year	1	$ 227.53	$ 227.53	$ 227.53
Plan management financial administration (billed monthly)	12	1	Year	1	$ 102.28	$ 102.28	$ 1,227.36
Speech - 1 session 1 time a month (monthly), for 2 hours	1	1	Month	2	$ 180.00	$ 360.00	$ 4,320.00
OT - 1 session every 2 months, for 2.5 hours (2 1/2 hours)	1	2	Month	2.5	$ 190.00	$ 475.00	$ 2,850.00
Psychologist - 6 sessions in 1 year, for 1 hour	6	1	Year	1	$ 150.00	$ 150.00	$ 900.00
Support worker to help learn new cooking skills	1	2	Week	1.5	$ 50.00	$ 75.00	$ 1,950.00
			Select an option				
			Select an option				
			Select an option				
			Select an option				
TOTAL ESTIMATED CAPACITY BUILDING							$ 11,474.89

change from every week to every 2 weeks

change from 1 hour to 1.5 hours

this updates automatically

End of examples. If you have feedback on the support organiser you can email MyPlanFeedback@ndis.gov.au or contact the NDIS on 1800 800 110.