Creating your plan

This factsheet explains:

- how we create your plan
- how we decide what NDIS supports to include in your plan
- how we include NDIS funding in your plan
- how your NDIS funding is managed
- how long your plan will go for
- when we approve your plan
- what to do if your situation changes.

This fact sheet explains how we create new plans, or plans that are reassessed after 3 October 2024.

How we create your plan

We create your plan based on your individual disability support needs that are directly related to your disability. We'll use the information you give us about your lived experience and how your disability impacts your day-to-day life.

We will:

- get to know you and discuss your situation
- ask you about your goals, or things you want to work towards

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- think about what supports your family, friends, community and other government services can provide
- think about any NDIS supports you may need
- review any information gathered by your community partner if they supported you to apply to the NDIS
- ask for further information about your support needs if we need to
- meet with you to approve your plan
- send your plan to you.

You can ask other people to help you if you want to. For example, you can have friends, family or an advocate join any conversation we have with you. They can also help you make your own decisions about your plan.

We use the information you give us as evidence to help us decide what NDIS supports to include in your plan. Sometimes we may ask for more evidence to support funding an NDIS support. The additional information may tell us why you need the support and how the support directly relates to your disability. We may not be able to fund an NDIS support if we don't have enough evidence to support including it.

Setting goals in your NDIS plan

We need to know your goals and aspirations so we know how we can help you.

Your goals are your own and tell us about the things you'd like to do. You can have as many or as few goals as you like. They can be big or small, short term or long term, simple or complex. They can be about anything you want to work towards.

You may express your goals broadly or specifically. For example, one of your goals might be to live independently, and another to have an accessible bathroom.

You, your plan nominee or child representative set your goals and tell us what information you want to include about your life. Your family and friends who support you can also give us information about their life, if you want them to.

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How we decide what NDIS supports to include in your plan

We fund NDIS supports that directly relate to your disability. This means there must be a direct link between your disability support needs and the NDIS supports we fund.

NDIS supports are the services, items and equipment we fund under the NDIS. The supports in your plan are specific to your situation and must meet all reasonable and necessary criteria. This means the NDIS supports in your plan will most likely be different to the NDIS supports in someone else's plan.

Your NDIS supports are just one part of your plan. Your plan also has information about supports provided by your family, friends, community, and other government services. We want to make sure all these parts of your plan work together to meet your disability support needs and help you pursue your goals.

Learn more about how we decide what NDIS supports to include in your plan in Our Guideline – Creating your plan.

How we include NDIS funding in your plan

Your plan will include:

- a total funding amount
- funding component amounts, and
- funding periods.

Total funding amount

Your total funding amount is the total amount for all reasonable and necessary supports funded in your plan. We'll call this the 'total budget amount' in your plan.

We develop the total funding amount by using the information you gave us and the NDIS funding criteria.

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For each reasonable and necessary support, we look at:

- if you share this support with anyone
- how much of this support you need, including the hours, items or equipment
- how often you need this support, including days, weeks, months or years.

We use the NDIS pricing schedule to help participants and disability support providers understand how price controls for supports and services work in the NDIS. You can find more information in NDIS pricing arrangements and price limits on the NDIS website.

We then work out the funding for each support and combine these amounts to arrive at your plan's total funding amount.

Funding component amounts

The funding component amount or amounts is funding for a specific support or group of reasonable and necessary supports in your plan. This is the total amount of funding you have for these supports over the full length of your plan. You can only use this funding for the NDIS supports included in each funding component.

Funding periods

A funding period is the time that a part of your funding becomes available and how long it needs to last. For most supports, funding periods will generally go for 3 months. But they may be shorter or longer depending on:

- the total funding amount in your plan
- the type and cost of supports in your plan
- how long you'd like your funding periods to go for
- your circumstances and any risk to you.

You can spend up to the amount of funding that is available in that time. We'll tell you in your plan when each funding period starts and ends.

If you don't spend all your funds in a funding period, they'll roll over into your next funding period within the same plan.

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Learn more about how to use your funding in Our Guideline – Your plan on the NDIS website.

If you would like more details about the NDIS supports that make up the total funding amount in your plan, you can ask us to send this to you. We can give you this if you have a new or reassessed plan approved after 3 October 2024.

How your NDIS funding is managed

We'll talk with you about how you want to manage your funding during your plan meeting.

There are different ways the funding in your plan can be managed. You can:

- self-manage
- use a registered plan manager
- have the Agency manage your plan, or
- have a mix of these options.

You can manage your funding the way you want to, unless it would be an unreasonable risk to you. For example, if:

- you, your plan nominee or child representative are currently bankrupt or insolvent, or
- you're unlikely to spend your funding on only NDIS supports and in line with your plan.

Or, if we're aware that:

- you or your nominee have been convicted of an offence punishable by 2 or more years in prison
- you or your nominee have been convicted of an offence involving fraud or dishonesty.

There are also some NDIS supports that must be Agency-managed. Learn more about your options for managing your funding in Our Guideline – Creating your plan on the NDIS website.

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How long your plan will go for

We think about your situation, what plan length will best meet your needs and how long you want your plan to go for. If your living and support needs are stable and not likely to change significantly, your plan will generally go for:

- 5 years if you're aged 9 and over
- 2 years if you're younger than 9.

We know that shorter plans are needed in some situations. Learn more about how we decide how long your plan will go for in Our Guideline – Creating your plan on the NDIS website.

Your plan will state the date we must do a plan reassessment, if we haven't reassessed your plan before this date. Learn more about plan variations and plan reassessments in Our Guideline - Plan reassessments and Our Guideline - Plan variations on the NDIS website.

When we approve your plan

We'll approve your plan as soon as we reasonably can. In some cases, we can do this during your plan meeting.

We aim to approve your first plan within 56 days after you become a participant.

If we need more information from you, this might mean it takes longer to approve your plan. Depending on your situation, we might decide to approve your plan so you can start using it right away and make changes later.

We'll send you a copy of your approved plan within 7 days, in the way you'd like to receive it. We can also send it to anyone else you ask us to share your plan with.

Once you have your plan, you can start using it to buy your NDIS supports. We'll also offer you a plan implementation meeting to help you start using your plan.

For more information, go to Our Guidelines on the NDIS website.

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What to do if your situation changes

If your situation changes after we approve your plan, your plan might need to change to make sure it still works for you.

You can talk to your my NDIS contact, support coordinator or recovery coach about the changes you need. You might need to give us more information to explain why you think your plan needs to change. Learn more about the evidence you need to give us before we change your plan on the NDIS website.

If you don't agree with the decisions we've made about your plan, you can ask us for an internal review.

You can do this up to 3 months after your plan is approved. Your my NDIS contact can help you to ask for an internal review and gather any information or evidence you'll need. For more information, read to Our Guidelines on the NDIS website.

National Disability Insurance Scheme

ndis.gov.au

Telephone 1800 800 110

Webchat ndis.gov.au

Follow us on our social channels

Facebook, Instagram, YouTube, LinkedIn

For people who need help with English

TIS: 131 450

For people who are deaf or hard of hearing

TTY: 1800 555 677

Voice relay: 1800 555 727

National Relay Service: accesshub.gov.au

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