



Creating your plan

Quick summary: We will work with you to create your plan. We'll have a conversation with you to help us decide what supports to fund in your plan. We'll also work with you to decide who will manage your funding, and when we'll change your plan.

Note: When we say 'your plan' we mean your NDIS plan. If you're looking for information about community connections, go to [Our Guideline – Community Connections](#).

If you're looking for information about your child's early connections, go to [Our Guideline – Early Connections](#).

What's on this page?

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What principles do we follow to create your plan?

The NDIS was set up as a world first approach to disability support. It puts people with disability at the centre of decision-making, through the principles of reasonable and necessary supports and individual choice and control.

As an insurance-based scheme, we take a lifetime approach to a participant's support needs. We provide assurance to people with permanent and significant disability or developmental delay, and to people who might acquire disability or developmental delay, that they will get the support they need. Individual funding means we help participants to purchase services and supports from a competitive and consumer-driven marketplace.

What supports can we fund?

NDIS supports should complement, not replace, other supports available to you. That's why we consider:

- the things you're able to do for yourself
- support you have from others in your network, including family members, relatives, friends, local community services and mainstream government services.

One of our aims is to help maximise your independence by working with the local mainstream government and community services that help you live an ordinary life. We all do best when we're connected to our communities.

And as an active consumer, it's important you are able to shop for and access providers who meet your needs. We can help you find providers who meet your needs.

Once we've considered your circumstances, we need to follow the rules determined under the law for the NDIS in our planning decisions.¹ We fund supports that are reasonable and necessary.

This means we will only fund a support if it meets **all** of the following criteria:

- the support is related to your disability²
- the support will help you pursue your goals and aspirations³
- the support will help you undertake activities that will increase your social and economic participation⁴
- the support is value for money,⁵ which means that the costs are reasonable:
 - when compared to the benefits to be achieved, for example, whether purchasing the support is likely to reduce the cost of funding other supports in the long term⁶

- when compared to alternative options that may provide you with the same outcome at a similar or lower cost⁷
- the support is likely to be effective and beneficial for you, having regard to good practice and evidence⁸
- the support is required to complement the informal supports you have available, by considering what is reasonable for families, carers, informal networks, and the community to provide⁹
- the support is most appropriately funded or provided by the NDIS¹⁰
- the support is not more appropriately funded by another service system, agency, person, or body, such as the education system or the health system.¹¹ We can't fund a support if it's the responsibility of another service system.

What supports don't we fund?

We do not fund a support if:¹²

- it is likely to **cause harm** to you or others¹³
- it is **not related** to your disability¹⁴
- it **duplicates** other supports delivered by the NDIS¹⁵
- it is considered a **day-to-day living cost** (for example, rent, groceries or utility costs like your water bill) that are **not attributable or caused by** your disability support needs¹⁶
- providing the support would be **against the law**¹⁷
- it consists of **income replacement**¹⁸
- it is the **responsibility of other service systems** to provide (for example, your state government, the education system, or the health system).¹⁹ These different systems have different responsibilities and are designed to complement each other to form a government safety net. Like all Australians, NDIS participants continue to have access to these systems. We can't fund a support if it's the responsibility of another service.

How do we manage the financial sustainability of the NDIS?

The NDIS is an insurance scheme, and one of our core functions is to manage the financial sustainability of the Scheme.²⁰

When we make decisions about the supports we fund in your plan, we must also consider our need to ensure the **financial sustainability of the NDIS**.²¹ This means we must work



within our funding budget, set through agreements between the Australian, and State and Territory governments.

It's also important to know the NDIS is only one part of the broader National Disability Strategy that supports people living with disability. The overall success and sustainability of the National Disability Strategy relies on:

- people accessing their informal support network to get the help they need from day-to-day
- people using their personal income to pay for their day-to-day living expenses, as is expected of all Australians
- mainstream and community services being available from state and territory governments, and other federal government programs such as Medicare
- a fair distribution of NDIS supports to those who need them, provided within our funding budget.

Staying within our budget ensures the NDIS will be here to support generations of Australians and their families.

What principles do we use to create your plan?

We use the following 7 principles, to create plans that help you get the reasonable and necessary supports you need, and to make sure the Scheme is financially sustainable:

- [Fair for everyone, both today and for future generations](#)
- [Fair funding to pursue your goals](#)
- [Evidence-based best practice](#)
- [Fair early investments](#)
- [Fair support across service systems](#)
- [Fair supports for your disability needs](#)
- [Fair assistance from multiple programs](#)

Fair for everyone, both today and for future generations

While we need to consider your individual circumstances and disability needs, we also need to make consistent decisions and treat people fairly.

This means participants with similar circumstances and disability needs should receive similar amounts of supports in their plans. We also need to ensure the total cost of all participant plans are within the overall NDIS budget set by governments.

Each support in your plan must be reasonable and necessary. They also need to be reasonable and necessary as a package of supports. We approve your whole plan, not the individual supports in your plan in isolation.²² Information about what supports we'd usually include in your plan helps guide this process.

This information also helps to guide the consistency of our decision-making process. We use it to check your overall plan and make sure all your supports make sense together. We'll check your support types and amounts will complement each other to help you fulfil an ordinary life.

We may then increase or decrease the funding in your plan based on:

- information you share with us
- any reports or other information we have
- applying the [NDIS funding criteria](#).

This helps keep the system fair for everyone, and ensure we remain financially sustainable.

Fair funding to pursue your goals

Goals are important.²³ The supports we fund need to help you maximise your independence and pursue your goals.²⁴ This means your supports should help overcome any disability-specific barriers which may be stopping you from pursuing your goals.

This doesn't mean we fund all support costs associated with you pursuing your goals. Also, you may have goals and aspirations we can't fund supports for. This is because helping you pursue your goals is only one of the NDIS funding criteria, so not all supports that help you to pursue your goals will be reasonable and necessary.

Other things to know about when setting your goals:

1. **Setting more goals or bigger goals doesn't mean we'll provide more funding or fund more supports.** For example, if your goal is to live independently in a house with a swimming pool, we may fund home modifications that address your disability-related needs. This might be a home modification to make your bathroom accessible.

We won't fund the swimming pool because this isn't related to your disability support needs. The funding in your plan might be similar to someone else who has a goal of 'to have a more accessible bathroom'.

2. **Setting a goal doesn't mean we have an obligation to fund supports that help you pursue that goal.** For example, if your goal is to get a gym membership to get fit, we wouldn't usually fund this. Gym memberships are things that all people, with or without disability, might want or need.



3. **Setting a goal about an explicit type or amount of support you might want doesn't mean we have an obligation to fund that support or provide that amount of funding.** For example, you may tell us your goal is 'to get a top model shower commode' and you show us the one you want costs \$4,000.

If there is a shower commode that costs \$3,000, and your occupational therapist confirms this one will meet your needs, we are more likely to fund this one instead because it is likely to deliver the same result at a lower cost. We may also look at alternatives.

Evidence-based best practice

We only fund supports that will be, or are likely to be, effective and beneficial for you, having regard to current good practice.²⁵ This means we consider if there is evidence that the support is effective and beneficial for someone with similar disability support needs.

For example, we may already have information about whether the support is widely accepted to suit someone with your disability support needs.²⁶ The primary source of evidence we rely on, and give the greatest weight to, is evidence from sources that are reliable and widely recognised. This includes published and refereed literature, and any consensus of expert opinions. If there is no evidence to show a support is reasonable and necessary,²⁷ we won't fund the support.

You can find the types of evidence we need on [our website](#), and in [Our Guidelines](#).

Fair early investments

Having access to capacity-building supports early in your NDIS journey is considered to be an early investment. This early investment is intended to help increase your independence and reduce your reliance on NDIS funding over time.

This is an important concept we consider when we create your plan, and again at future plan reassessments. When we reassess your plan, we reassess all the supports you require to meet your disability support needs at that time.

Over time, your capacity building supports may no longer be reasonable and necessary, in regard to any of the following:

- your current functional capacity
- the effectiveness of the capacity building supports²⁸
- value for money.²⁹

When we say functional capacity we mean the things you can and can't do for yourself.

Your overall funding amount could go down from one plan to the next. This may be because you no longer need the same type or amount of supports, such as capacity building



supports. Also, if the capacity building investment has been successful at building your independence, then your need for other supports may also decrease. For example, as you develop your skills you may not need as many Core supports.

So other things being equal, you should expect your overall plan value to reduce over time as the benefits of capacity building are realised.

Fair support across service systems

The support you need may be the responsibility of another government service, like education or health. We don't fund these services. We need to think about the supports you should receive from these services when we determine the supports in your plan.

Fair supports for your disability needs

When we make decisions about which supports we can fund, we consider whether a support is reasonable and necessary for you and apply the [NDIS funding criteria](#). Sometimes, you might ask for supports to help with impairments that were not part of your Access eligibility assessment. When this happens, we need to make sure the support will help you address the needs that arise from an impairment that meets the same eligibility requirement we consider at [Access](#).

You don't need to make a new Access request if you ask for supports to help with an impairment which was not part of your Access eligibility assessment. We'll work out if you need the support to address an impairment which would meet our eligibility requirements. We may ask you to provide evidence to help us work this out. We will decide if the requested support is reasonable and necessary. We'll apply the NDIS funding criteria based on the impairments which meet our eligibility criteria.

We fund the right disability supports for your permanent impairments which meet our Access criteria. By doing this we make sure the system is fair for everyone, and the NDIS remains financially sustainable.

Fair assistance from multiple programs

NDIS funding can't duplicate other funding or supports you may receive due to your disability.

For example, you may have received a lump-sum payment or receive regular payments as a form of compensation for an accident. Or, you may be receiving ongoing supports from another program or insurance scheme, for example Work safe, Lifetime Care and Support or the Transport Accident Commission.

We don't duplicate this funding, or these supports. We may reduce the total value of your NDIS plan to account for compensation you receive, or we may not fund certain supports.

What is an NDIS plan?

Once you're an NDIS participant, we will work with you to create your NDIS plan. You can find out more about how to become a participant in [Applying to the NDIS](#).

Your NDIS plan sets out your goals and the supports that will help you pursue those goals. We create your plan based on the support needs directly related to your disability. Your plan will be just for you. You can have as many goals as you want in your plan, and they can be as long as you want.

Your plan will include information about:³⁰

- you and your living situation
- your goals, or things you want to work towards
- who supports you, for example your family, friends, community, and other government services
- any NDIS supports we fund
- how you can use your NDIS funding
- who will manage your NDIS funding
- when we'll change your plan.

This guideline is about how we make decisions when we create your plan

How do we create your plan?

We create your plan based on your individual situation and disability support needs. We'll use the information you give us about your lived experience, and the evidence you give us about how your disability impacts your day-to-day life. We will:

- get to know you and discuss your situation
- think about what supports community and other government services can provide to help you pursue your goals and live as independently as possible
- think about if you need any NDIS funded supports, and if they meet the [NDIS funding criteria](#)
- 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.

If you need someone else to make decisions for you about your NDIS plan, we can help you set this up. This may be:

- a [plan nominee](#) if you're an adult
- a [child representative](#) if you're under 18 years old.

We'll create your plan within **21 days** after you become an NDIS participant.

What can you expect from us when we create your plan?

We'll create a plan that will:³¹

- be personalised and directed by you
- respect the role of family, carers and other people who are important to you
- build the capacity of families, carers, and your community to support you, where appropriate
- consider the support your friends and family provide, and the support services available to everyone in the community
- respect your right to have control over your life and make your own choices
- help you participate in the community, and help you study or find and keep a job, if you want to
- focus on choice and flexibility when it comes to your goals, needs and your supports.

What information do we look at?

The information you give us helps us decide what NDIS funded supports to include in your plan.

We look at:

- the information you gave us when you talked to us about applying to the NDIS
- any support you may get through community connections
- any reports from your doctors or allied health professionals
- other assessments you give us, for example from other government agencies or disability service providers
- other relevant information we have about your support needs



- any other information you give us, including about your lived experience.

To learn about your life and the supports you need, we'll also look at:

- your goals
- where you live, and your living arrangements
- how you move around your home and your community
- who supports you now, like your family, friends, or service providers
- support available from community and other government services to help you learn new skills and become more independent
- what self-care support you need
- if you use or need [equipment, technology or devices](#), also known as assistive technology
- what [social and recreation activities](#) you'd like to do now or in the future
- if you need help to build friendships or connect with your family
- if you'd like to [work or study](#) now or in the future
- what support you need to build your skills and do more things yourself.

We will keep your personal information safe and secure.

You can ask to change your plan at any time.

How do you set the goals in your NDIS plan?

We need to know your goals 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 want.

Your goals 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 you may have specific goals. For example, one of your goals might be to 'live independently', and another might be 'to have an accessible bathroom'.

You can set any goals you like, even if they're about things we won't fund.

How can you tell us your goals and the information about you?

The first part of your plan has information about:³²

- your daily life and living situation

- your social, work and study life
- the people who support you
- your goals.

You, or your plan nominee or child representative, set your goals and tell us what information you want to include about your life. This is sometimes called the 'participant's statement of goals and aspirations'.³³

If you want, your family and friends who support you can also give us information about their life.

You can tell us about your goals at any time before we approve your plan. If you tell us your goals in person or over the phone, we'll write them down for you.³⁴

They are your goals, and we'll write them down in your own words. We can't change your goals or choose them for you. But we can help you choose what words to use if you want us to.

Learn more about [setting your goals](#).

Will we always fund supports for your goals?

Your NDIS funding aims to provide you with the supports you need for your disability.

These supports may help you maximise your independence and pursue your goals. You can also get support through [mainstream and community services](#), or informal supports you can get through family and friends.

The supports we fund should help you pursue your goals,³⁵ but you don't need a specific goal for every support in your plan. When we decide if a support will help you pursue your goals, we think about your whole situation.

We look at the barriers related to your disability that prevent you from pursuing your goals, and how the support will address your disability support needs.

There are some things to remember when setting goals:

- Setting more and bigger goals doesn't mean we'll fund more and bigger funded supports.
- Setting a goal doesn't mean we have an obligation to fund supports that help you pursue that goal.
- Setting a goal about an explicit type or amount of support you might want doesn't mean we have an obligation to fund that support or in that amount.

This is because helping you pursue your goals is only one of the NDIS funding criteria.³⁶ A support must meet all of the [NDIS funding criteria](#) to be funded under the NDIS. So not all



supports that help you pursue your goals will be reasonable and necessary supports we can fund in your plan.

For example, you might be ready to look for work and have a goal to find a job. [Disability Employment Services](#) help people with a disability look for jobs, so we might not be able to fund this support.

But we can help you connect with a Disability Employment Service and consider what supports we could fund to help build your job skills. Learn more about [work and study supports](#).

Learn more about [how we consider your goals](#) when we decide what supports to include in your plan.

Who can help you set your goals?

You can ask other people for help to set your goals if you want to. For example, your friends, family, or My NDIS Contact can help you.

You can also change your goals at any time, even after we approve your plan.

We'll talk with you about what your goals will mean for your NDIS plan. For example, we could talk about:

- what your goals will look like for you
- how you can work towards your goals
- when you'd like to work on your goals
- what supports you need to work towards your goals. But just because you have a goal doesn't mean we have to fund supports for it.
- where you might get supports to work towards your goals, for example community or mainstream services
- if we'll fund supports to help you work towards your goals
- how you could develop skills and talents you haven't focused on before
- what supports you need to overcome any challenges in working towards your goals
- if you'd like to include smaller goals as part of a big goal
- if you'd like to add a few steps to work towards your goals.

For example, you might choose a goal, 'I want to go on a holiday next year'. You might also choose to add steps like saving up money for your travel and hotel, towards achieving your goal.

Learn more about [preparing your goals](#).

How do we think about risks when we create your plan?

You have the right to decide what you do each day and to make your own life choices. For all of us, our choices come with some risks. We all make our own choices about how much risk we want to take in our lives. You should also be able to choose how much risk you want to take in your life.

We'll work with you to understand areas of risk in your life and things that may increase risk of harm to you. This includes being aware of your individual situation, the transitions in your life and recognising your own experience.

We'll help you think about supports that help you live your life the way you want to.³⁷ We balance your right to take reasonable risks in pursuing your goals, with your safety and the safety of other people.³⁸

When we create your plan we'll talk with you about how we can help you reduce risks. There are a few things we could do to reduce risk and make sure your plan meets your needs. For example, we could:

- check in with you regularly about how your plan is meeting your disability support needs and if you need any changes
- fund supports to help you build your support network, for example to help you make friends or build relationships in your community
- set up regular chats with your My NDIS Contact
- make sure any providers using restrictive practices are NDIS registered and follow the [NDIS Quality and Safeguards Commission](#) requirements
- let you know about how you can make a [complaint](#) about your service providers or about our service if there are any issues
- include funded supports to help build your skills so you can manage the funding in your plan.

The NDIS Quality and Safeguards Commission also manages [NDIS worker screenings](#) to check if a worker is safe for you to use. If you self-manage your funding, you can check if workers you employ are already cleared with an NDIS worker screening check. You can also ask providers, employees or contractors providing you with supports to do an NDIS worker screening check. If you're using registered providers, workers should already have an NDIS worker screening check.

We'll support you to make your own choices wherever possible. But we can't fund supports that are likely to risk harming you or someone else.³⁹

Some of these risks might affect what we can fund in your plan, or who manages your NDIS funding. For example, there might be risks to your personal safety, your personal money, or your NDIS funding.

We think about if there are any risks with your current support arrangements. For example, there might be risks to your family or friends' health if they keep supporting you when they get older. If so, we could look at including NDIS funded supports to reduce these risks.

We also consider any risks around your safety and wellbeing. For example, there could be risks if you're socially isolated, or rely only on providers for support. Or there could be risks of physical injury to you or the people who support you.

How do we decide what supports to include in your plan?

NDIS supports are the services, items, and equipment we fund or provide under the NDIS. An NDIS support is the practical description of how we help you under the NDIS.⁴⁰

There are two types of NDIS supports:

- the general supports we provide to you
- the reasonable and necessary supports we fund in your plan.

General supports

General supports are those we provide to you, like a local area coordinator or early childhood partner.

We help you develop your plan and connect with supports and activities in your area. For example, we can help you connect with:

- **informal supports** like your friends, family, or other people you know in your community
- **community supports** that are open to everyone in the community, like sporting clubs, activity groups or libraries
- **mainstream supports** – other government services like the health or education systems.

General supports are not funded through your NDIS plan.

General supports can be provided by:

- an [early childhood partner](#) for children younger than 9 – learn more in [Our Guideline – Early connections](#)
- a [local area coordinator](#) for people aged 9 or older – learn more in [Our Guideline - Community Connections](#)

- [Remote Community Connectors](#)
- [Aboriginal Disability Liaison Officers](#)
- community organisations through the Department of Social Services [Information, Linkages and Capacity Building program](#).

We can provide these general supports to everyone with a disability, including people who are not NDIS participants.⁴¹

Reasonable and necessary supports

Reasonable and necessary supports are the disability supports we fund in your plan. You can use this funding to buy supports from service providers.

All NDIS supports funded in your plan need to meet the [NDIS funding criteria](#). For example, they need to directly relate to your disability, be value for money, and effective and beneficial.

We also consider how your supports will work together as a package to address your disability support needs, or to achieve an outcome. The supports we fund must be reasonable and necessary individually, but they must also be reasonable and necessary as a package of supports.⁴²

If you need a new support, which now means your overall package of supports doesn't meet the NDIS funding criteria anymore, we may either:

- not include the new support in your plan
- include the new support in your plan, but also reduce the other supports in your plan.

For example, a home modification may reduce your need for other supports. We'll need to take any planned home modification into account when we think about what other supports you need. For example, you might need less supports for care at home.

We look at all the information we have when we decide what supports to include in your plan.

Check out [Our Guideline – Reasonable and necessary supports](#) to learn how we decide what supports to include in your plan, and how we describe them.

We also consider our [Participant Service Charter](#) and [what you can expect from us when we create your plan](#).

We have detailed information on how we make decisions about different types of supports. [Learn more about supports we can fund](#).

How we describe the supports in your plan

We divide your supports into 4 different budgets:

- **Core supports**

These supports help you with everyday activities, like helping you to take part in activities in the community. This budget is mostly flexible so you can use funding from one support category to pay for something in another support category.

- **Capacity building supports**

These supports help you build your skills and maximise your independence, and reduce the need for the same level of support in the future. Your progress and outcomes from these supports will be shared at each plan reassessment. Capacity building supports are stated so you won't be able to use funding from one support category to pay for something in another support category.

- **Capital supports**

These supports include high cost assistive technology, equipment, vehicle modifications, home modifications and specialist disability accommodation. Capital supports are stated. You can only use this funding to buy approved individual supports in this support category.

- **Recurring supports**

These supports are paid by us on a regular basis, so you don't need to claim for these. Your funding for recurring supports will be paid regularly to your nominated bank account. This funding is not included anywhere else in your budget and includes mainly transport supports.

Each budget is divided into a number of support categories. Support categories have more detail about what supports you can buy with your funding. We can describe the support categories in your plan as one of the following:

- **Flexible:** Under the law for the NDIS, this is when we describe the support generally. Most support categories are flexible so you have greater flexibility over what disability supports you can buy within the flexible support categories.⁴³ When we describe your support categories as flexible, you can usually choose what supports you buy within the descriptions for each support category.
- **Stated:** Under the law for the NDIS, this is when we describe the supports in the support category specifically. It means you must buy the support in the way we have described in your plan.⁴⁴ We'll be clear when we describe a support category as stated in your plan.



We describe most support categories as flexible when we can. You have greater flexibility over the support you can buy in your flexible budgets. When support categories are described as stated, you have less flexibility.

Some stated budgets are more specific than others. More specific budgets have less items you can spend your funding on.

Your Core supports budget is the most flexible. You can usually use your funding across all the support categories in the Core supports budget if:

- we described the supports as flexible
- you have the same plan management options for all your Core supports.

Learn more about the [support budgets and support categories in your plan](#).

We also consider our [Participant Service Charter](#) and [what you can expect from us](#) when we create your plan.

We look at all the information we have when we decide what supports to include in your plan.

Check out [Our Guideline – Reasonable and necessary supports](#) for how we decide what supports to include in your plan and how we describe them.

What if we need more information?

Sometimes we might ask for more information.

We can ask you to:

- give us more information that we need to approve your plan⁴⁵
- get an assessment of your support needs, usually from an allied health professional, and send us the report⁴⁶
- get a medical, psychiatric, or psychological examination and send us the report.⁴⁷

For example, we might need more information if you have complex care needs. We could ask you to get an assessment from an occupational therapist. This will help us understand your support needs at home and in the community. It also helps us work out what supports to fund in your plan.

We can also ask someone else to give us information we need to create and approve your plan.⁴⁸ For example, we can ask your doctor, or the people who support you, to give us information.

When we ask for more information or to get an assessment, we'll tell you:

- what you need to do

- what information we need
- how you can send us the information
- when you need to give us the information.

We must give you a reasonable opportunity, and a reasonable amount of time, to give us this information.⁴⁹ The sooner you can give us the information, the sooner we can create and approve your plan.

Your plan will include funding for any assessments or examinations we ask for. If we need independent information about you, we avoid any conflicts of interest as much as possible. This means we usually won't choose an assessor you know.

We only ask for an assessment or examination if:

- it will help us create your plan
- we don't already have the information
- the benefits outweigh the time and cost.

You don't have to give us this information or get these assessments. But without them, we might not have enough information to understand and approve the supports you need.

Sometimes, we might need to approve your plan before you give us this information.⁵⁰ We could then change your plan once you have the assessments and reports for other supports, such as high cost assistive technology.

Learn more about [changing your plan](#).

What are your options for managing your funding?

You have [three options for how you can manage the funding in your plan](#).⁵¹

- [Self-managed](#): you, or your plan nominee or child representative, manage the funding and pay your providers.
- [Agency-managed](#): we manage the funding and pay your providers.
- A [registered plan manager](#) manages the funding and pays your providers.

You can also choose a mix of these options. For example, you might like to manage some of the funding yourself, and we'll manage the rest.

There are different benefits for each plan management option.

Self-management gives you the most flexibility. You can choose any provider and pay them more than the [NDIS Pricing Arrangements and Price Limits](#).



Using a registered plan manager provides you with support and assistance to manage your funding.

Having your funding Agency-managed means you'll have less things to do when it comes to managing your funding.

You might want to manage every decision when it comes to your NDIS funding and the supports you receive. Or you may want someone to help you manage some or all of your funding.

Whether your funding is managed by you, us, or a registered plan manager, managing NDIS funding means:⁵²

- buying the supports in your plan, including paying taxes
- receiving and managing your NDIS funding, including paying for supports on time
- keeping track of what you buy with your funding, including keeping receipts and invoices
- spending your funding according to your plan.⁵³

We're committed to helping you have more choice and control when it comes to managing your funding, if that's what you want.

We'll talk to you about what you want and what suits you when it comes to managing your funding.

We'll talk more about the different plan management options in the following sections.

Your plan will say who manages your NDIS funding.⁵⁴

Learn more about [ways to manage the funding in your plan](#).

There are a few other things to remember when you choose who manages your funding:

- You must use [NDIS-registered providers](#)⁵⁵ if your funding is Agency-managed. If you self-manage your funding or use a registered plan manager, you can use either NDIS-registered providers or unregistered providers.
- If your funding is Agency-managed or managed by a registered plan manager, your providers or your plan manager can't claim more than the [NDIS Pricing Arrangements and Price Limits](#). If you self-manage your funding, you can pay more than the [NDIS Pricing Arrangements and Price Limits](#), as long as you don't spend more than the total funding for the support in your plan.
- If you use a registered plan manager to manage your funding, we'll always include funding in your plan to cover plan-management costs.



How do we decide who manages your funding?

We'll ask you who you want to manage your funding. We'll discuss strategies to help you do this the way you want to. We'll let you know what your plan management options will mean for you.

You can also ask your friends or family for advice.

If you're under 18, your [child representative](#) can choose how to manage your plan funding.⁵⁶

If you want to self-manage your funding or use a registered plan manager, we'll agree to your request, unless:⁵⁷

- you want to self-manage the funding but that would be an [unreasonable risk to you](#)
- you already have a [plan nominee](#), in which case we'll talk to your nominee about your plan management options
- your plan nominee wants to self-manage your funding but that would be an unreasonable risk to you⁵⁸
- you want to self-manage the funding but you, or your plan nominee or child representative, are [bankrupt or insolvent under administration](#)
- you want a registered plan manager to manage your funding but that would be an [unreasonable risk to you](#)
- it's for [in-kind supports, or cross-billing payments](#) for younger people in residential aged care.

If we don't agree to your request, we'll let you know our decision and explain our reasons. We'll talk to you about the risks, and if there are ways we can help you [manage the risks](#) in the future.

If you're not happy with the decision we make, you can ask for a review of our decision.

Learn more about [requesting a review of decisions we make](#).

How can you change how you manage the funding in your plan?

You can ask us to change how you manage your plan at any time. You might want more control of your funding. Or there may be a change in your situation which may mean you need to manage your funding differently for a period of time. There are no restrictions on how often you can ask to change your plan management.

If you want to change how you manage your funding, you'll need to ask us to change your plan.⁵⁹ If this is the only change you want, we may be able to vary your plan without completing a full plan reassessment. Learn more about [changing your plan](#).



What does it mean to self-manage your funding?

We're committed to helping you manage your own funding if that's what you want to do. Managing your own funding can give you more choice and control over how the funding in your plan is used.

Self-managing your funding means you'll have the choice to decide what supports you buy in line with your plan. You can decide who provides these supports, and how they are delivered. You can also negotiate costs above or below the [NDIS Pricing Arrangements and Price Limits](#). This can help you arrange your supports in a way that gives you the best value.

You'll also be responsible for receiving your funding, arranging your supports and paying your providers on time. You'll need to keep records of invoices and receipts for 5 years, and meet your obligation as an employer if you choose to [employ staff directly](#).

You might want to self-manage only a part of your funding. This can be a good way to develop your skills, and help you self-manage more of your funding in the future if you want to.

How can you learn how to self-manage your funding?

You might want to learn or improve your skills to help you manage your NDIS funding. For example, you might want to build your skills to:

- budget and keep records of your purchases
- choose your supports and get the most out of your plan
- claim your NDIS funding, pay providers, and make service agreements.

You can check out our [guide to self-management](#), and learn more about [self-managing](#) and [how to claim from your plan](#) on the NDIS website.

If you have enough money available in your Core supports budget, you can use this flexibly to help you learn how to self-manage. For example, you might buy book-keeping services to help with payroll for staff you employ. Or you might buy an online training package to help with things like learning to budget and keeping records.

If you need support to build your skills to manage your funding, we might be able to fund support. If it meets the [NDIS funding criteria](#) we can include funding in your plan for capacity building and training in self-management. Talk to your My NDIS Contact about this.

You might use this funding to get your support coordinator or plan manager to help build your skills. You might choose to use the funding on training with another organisation. As you build your capacity in self-managing, you're likely to need less of this support in the future.

We can also answer questions about self-management and help you problem-solve when you start out.



We'll talk to you about whether there are any [mainstream and community supports](#) which could support you. These are the supports you get outside the NDIS, and are available to everyone, whether or not they have a disability. Supports outside of the NDIS can help you build your skills to manage your own finances and learn about self-management.

You might speak with your informal supports, and other participants who self-manage to learn more about self-management. Community supports can help connect you to important and practical information about self-management. You'll need to decide if information from outside the NDIS is reliable and if you want to use it.

We know you might be nervous about self-managing funds. We understand making mistakes can be an important part of learning to self-manage, and sometimes things can go wrong. If you have any issues, you can always [contact us](#) and we'll work with you to fix them.

Self-management and NDIS registered providers

If you self-manage your funding or use a registered plan manager, you can generally use any provider. But you must use an [NDIS-registered provider](#) if they provide:

- specialist disability accommodation
- [behaviour support](#)
- [supports where the use of restrictive practices occur or are likely to occur](#)

Sometimes we might also say in your plan which provider you need to use.

A registered provider meets the [NDIS quality and safety standards](#). Workers with registered providers also undergo an [NDIS worker screening check](#) to make sure a worker is safe for you to use.

If you choose a provider that isn't registered, you'll need to make sure they have the right qualifications, training, and safety checks. You can ask providers, employees or contractors providing you with supports to do an NDIS worker screening check.

Self-management and NDIS Pricing Arrangements and Price Limits

If you self-manage your funding, you can agree to pay more or less than the [NDIS Pricing Arrangements and Price Limits](#). But you always need to make sure you have enough funding in your plan to last for the whole plan period.

When can't you self-manage your funding?

You, or your plan nominee or child representative, can self-manage your funding unless:⁶⁰

- you, or your plan nominee or child representative, are currently [bankrupt or insolvent under administration](#)
- there's an [unreasonable risk](#) if you self-manage your funding.

Are you bankrupt or insolvent?

You can't manage your NDIS funding if you're currently insolvent under administration.⁶¹ Your plan nominee or child representative also can't manage your funding if they're insolvent under administration.⁶²

Insolvent generally means you can't pay your debts when they are due.

Your NDIS funding can't be self-managed if you, or your plan nominee or child representative:

- are currently [bankrupt](#) – contact the [Australian Financial Security Authority](#) if you're not sure
- have property under the control of people you owe money to,⁶³ for example, your bank or the Australian Financial Security Authority
- have a [personal insolvency agreement](#) to repay money you owe, and you haven't followed the agreement⁶⁴
- have a [debt agreement](#) to repay money you owe.⁶⁵

This also applies if you, or your plan nominee or child representative, are an insolvent under administration in another country.

You might be able to self-manage your funding if you are no longer insolvent under administration. But we'll consider if there might be an unreasonable risk if you manage your funding.

Your plan nominee might be a company or body corporate, like a service provider or advocacy organisation. If so, they can't be insolvent either.

A company or organisation can't manage your funding if they are under [voluntary administration, liquidation, or receivership](#).

How do we decide if there is an unreasonable risk to you?

You have the same right as all Australians to take reasonable risks in managing your money. We respect your right to take reasonable risks in self-managing your NDIS funding. But it's also important to understand any risks self-managing your funding might create for you.

In most cases, risks will be small, or can be managed. We'll work with you to address risks and support your request to self-manage your plan as much as possible. But you can't self-manage your funding if this would create an unreasonable risk to you.⁶⁶ Your plan nominee or child representative also can't manage your funding if that would be an unreasonable risk to you.⁶⁷

If we decide self-managing your funding will create a risk to you, we need to decide if this is an unreasonable risk to you. We will only decide a risk is unreasonable if there are no suitable safeguards or supports available to manage the risk of harm to you.

If you want to self-manage your funding, we'll consider if this could put you at risk. For example, we'll consider if someone might pressure you to do something.⁶⁸

When we look at the risks to you of self-managing your funding, we think about:

- how well you make decisions about your money⁶⁹. We'll look at things like how well you:
 - manage your everyday finances
 - schedule your supports and manage things like agreements and payments with your providers
 - use peer support or similar networks
 - understand employer obligations, such as when employing staff and considering health and safety issues
- if you have the capacity to manage finances⁷⁰
- if you were previously bankrupt or insolvent under administration, how well you manage your money now⁷¹
- if your informal supports could help you reduce any risks, for example if they help you manage your money.⁷²

We'll talk with you about any reasons which might make self-managing difficult for you. We'll discuss if you need [strategies which might reduce the risk for you](#).

How do we decide if there is possible physical, mental, legal, or financial harm to you?

When thinking about risks to you, we'll look at if there is evidence of possible physical, mental, legal or financial harm to you. Evidence of possible harm won't always mean there is an unreasonable risk to you if you want to self-manage your funding. We know it can be difficult to talk about this information. We'll only talk about it to make sure we can identify any possible risks. We can then work out together if you need help from us to manage risks.

Examples of physical harm might include if there is evidence of:

- you being injured from a reckless or intentional act, caused by you or another person, like a fracture, contusion, wound, burn or concussion
- you being physically assaulted by a carer, support person, family member or member of the community which causes serious harm or injury

- serious unexplained injury to you while receiving NDIS supports
- you having a history of habitual or continued substance abuse within the last 12 months.

Examples of mental harm might include if there is evidence of a family member, carer, or support person:

- denying you food as 'punishment'
- threatening to harm you
- abandoning you by denying support permanently
- consistently not letting you go out and do activities
- secluding or restraining you.

An allegation of you being subject to offensive, abusive, or demeaning language by a family member, carer, or support person, may also create an unreasonable risk to you.

Examples of legal or financial harm might include if there is evidence of:

- you being financially exploited
- frequent changes in a child representative or nominee
- an appointment of a trustee or guardian to manage your money by a court or tribunal⁷³
- you, your child representative or nominee having a gambling addiction
- you, your child representative or nominee being the victim of coercion, such as being coerced to sign for a loan or power of attorney
- you, your child representative or nominee being previously insolvent under administration in the past 5 years
- deliberate misuse of, or fraud, in relation to plan funds, by you, your child representative or nominee
- you, your child representative or nominee having been involved with the criminal justice system in relation to funds management or fraud.

What supports or strategies can we use to reduce risks?

We'll talk to you about how we can support you to manage any risks with self-managing your NDIS funding. We'll think about if there are supports and strategies available that reduce the risk to you before we make a plan management decision. In many cases this means you, your plan nominee or your child representative will still be able to self-manage part, or all of your funding. We just need to make sure the risk to you is not an unreasonable risk.

This document is correct at the date of publication.

Always visit ourguidelines.ndis.gov.au for the latest version.

We'll consider the specific risk to you and look at suitable ways to help you manage the risk. We can give general advice and information about self-managing your funding which might be enough to manage any risks to you. This includes information on things like employing your own staff and working with providers. If you're new to self-management, we can work with you to try and solve any problems you have. We might be able to fund a support coordinator or a registered plan manager to help you get started. Or funding for training in self-management.

Other strategies we can consider to reduce risks to you include:⁷⁴

- giving you a plan with a shorter length of time
- having regular check-ins with you
- stating how a support in your plan needs to be purchased. For example, there might be only a few providers who can safely provide a very specialised support.

When we think about risks, we also think about the types of supports you want to manage. If there is an unreasonable risk for you to self-manage some supports, you might be able to manage others. You might also be able to manage some of your funding now and manage more in the future if you're ready.

For example, you may want to self-manage your funding but haven't done it before. You may be unsure how to set up your budget and pay your providers. It might be a good idea to start small. We could support you to link to a peer support network to get information from other self-managers about how they manage their payments. You might be able to start with self-managing the social and community participation funding in your Capacity Building budget.

At regular [check-ins](#) you can let us know if you need any help to self-manage your funding, or if you want to manage more of your funding. Once you're familiar with the process of paying providers and keeping records, you might be ready to self-manage other parts of your funding.

What if you have a plan nominee or child representative?

If you have a plan nominee or child representative, they may be able to manage your plan funding if it's part of their nominee arrangement. We can decide to let your plan nominee or child representative manage your plan funding, unless they're insolvent under administration or it presents an unreasonable risk to you. We consider risk in the same way as if you want to self-manage your plan funding.

If your plan nominee or child representative wants to manage your funding, we'll consider if this creates risks to you. We'll think about:

- their capacity to manage your finances



- if any business or other interests might affect how they manage your money
- if we believe they will use your NDIS funding according to your plan
- if any safeguards or strategies in your plan could help reduce any risks to you.

We'll think about what strategies could reduce any risks of your plan nominee managing your plan funding. We'll talk to you and let you know our decision and explain our reasons.

Your plan nominee may also be able to request who manages your plan funding. They can do this if their nominee arrangement allows them to make decisions about parts of the preparation, management or changes to your plan.

Your plan nominee has to work out what you want. They need to make decisions that help your personal and social wellbeing.⁷⁵

Learn more about [nominees](#) or [child representatives](#).

What does it mean when a registered plan manager manages your funding?

You can choose a registered plan management provider to assist and support you to manage your NDIS funding. They can buy supports on your behalf from the funding you provide them from your plan.

A plan manager can help you:

- increase your financial and plan management skills
- pay providers
- increase your choice of providers
- get NDIS plan budget reports and help you monitor your budget

If you use a registered plan manager to manage your funding, we'll always include funding in your plan to cover plan-management costs.

If your funding is managed by a registered plan manager, your providers or plan manager can't claim more than the [NDIS Pricing Arrangements and Price Limits](#).

Having a registered plan manager can reduce risks involved with managing funding in your plan. But there can still be risks to you that we need to consider.

You'll still need to make sure any provider you choose provides supports that are safe and meet your needs. If there are no suitable safeguards or supports available to manage the risk of harm to you, the risk may be unreasonable.



We respect your right to take reasonable risks in having a registered plan manager manage your NDIS funding. We'll talk to you about what might help reduce any risks with having a plan manager manage your funding.

We'll agree to a registered plan manager managing your funding unless it would be an [unreasonable risk](#) to you. We'll then decide if supports need to be Agency-managed.

When we think about if there is an unreasonable risk to you, we'll consider if there is evidence of possible physical, mental, legal, or financial harm to you. We consider unreasonable risk and the strategies available to reduce risk, in the same way for a registered plan manager as we do for self-managing funding.

We also consider whether a provider has delivered supports to you in a way that has caused you physical, mental, legal, or financial harm. Or, if someone might pressure you to do something.

We can help you change your registered plan manager if you need to.

What does it mean when your funding is Agency-managed?

You can choose for your funding to be Agency-managed. This means we will pay registered providers directly, from funding in your plan, for services on your behalf.

We may also decide to make parts, or all, of your funding Agency-managed when we approve your plan.⁷⁶ We'll do this if you don't choose who you want to manage your funding. Or [if you can't](#), or don't want to, self-manage or use a registered plan manager for any parts of your funding.

When we decide if your funding should be Agency-managed, we think about your goals, supports and the providers you want to use. For example, if your funding is Agency-managed you'll need to use [NDIS registered providers](#)⁷⁷. If you prefer to use providers that aren't NDIS registered, we'll discuss your options with you. You might agree to use NDIS registered providers or consider self-managing or using a registered plan manager.

If your funding is Agency-managed, your providers can't claim more than the [NDIS Pricing Arrangements and Price Limits](#).

What if the supports have already been paid?

In some rare cases, other government agencies have already paid for supports through funding outside your plan. These supports have already been paid for, so you won't be able to manage the funding for these supports.

These include:

- [in-kind supports](#)

- cross-billing payments to the Department of Health and Aged Care if you're a [younger person in residential aged care](#).

How long will your plan go for?

Everyone has different goals, living situations, and circumstances. So, we'll work with you to decide how long it will be before we create your next plan. This will be based on your individual situation.

We think about how long you want your plan to go for. We'll try to make the plan length what you want, where we can.

If you're not happy with how long your plan goes for, you can ask for a variation to your plan. Learn more about [changing your plan](#).

Your plan will say when we must do a plan reassessment, if we haven't reassessed your plan before this.⁷⁸ This is called the 'plan reassessment due date'. We could write this as:

- a date, for example '1 January 2024'
- a circumstance or milestone, for example 'when Constantine starts school'
- both a date and a milestone, for example 'when Macey starts her new job, or 1 July 2023: whichever happens first'.

We have more information in [Appendix A](#) on how long we usually make your plan.

When will we give you a longer plan?

If your support needs are stable and your situation will likely stay the same, we generally give you a 3-year plan. Your plan can be up to 5 years if:

- you know how to use your NDIS plan
- your disability support needs are stable
- you have strong informal supports and living arrangements
- your work or study situation is stable.

Example

Sarah is 35 years old and has had several plans. Her previous plans worked well. She has the Core supports she needs and it's unlikely her support needs likely will change soon.

She asks for a longer plan as she knows what supports she needs. Her planner decides to approve a 5-year plan.

When will we give you a shorter plan?

We'll only give you a shorter plan if your needs might change over the next year or two. This includes if you:

- are likely to leave the NDIS in the next 3 years, including if you were eligible for the NDIS under the early intervention requirements
- are younger than 7
- have changing support needs, such as if your disability gets worse over time
- might change your work or study in the next year or two
- don't have a strong support network, or there are risks to your safety or your personal money
- have very high support needs, or need behaviour supports
- need assessments to determine your disability support needs
- need high cost assistive technology or home modifications
- need disability-related health supports.

See [Appendix A](#) for when we might give you a shorter plan.

We might also give you a shorter plan if you need extra help to link in with supports. Or you might need extra help to use your funding according to your plan.

For example, we could give you a shorter plan and include funding for support coordination. A support coordinator could help you use the right amount of funding each month. When we next change your plan, we can check if you're linked in to the supports you need. And, we'll check if you're using the right amount of funding.

If you're a [younger person in residential aged care](#), we usually give you a one year plan and we'll [check in](#) with you regularly. We'll discuss how we can help you move out of aged care if you want to, or whether your supports work for you if you want to stay. We may be able to give you a longer plan if you want one.

Remember, you can always talk to your support coordinator or My NDIS Contact if you want to move out of residential aged care.

Example

Joe is 16 and will finish school in 18 months. We give Joe a 17-month plan. He'll have the chance to set new goals before he gets his next plan.

When it's time to create his next plan, we can have another look at his supports. His next plan will include his goals and support needs after he leaves school.

When will we approve your plan?

We'll approve your plan as soon as we reasonably can based on your situation.⁷⁹ We may take longer to approve your plan if we need you to give us more information or get an assessment.

For children younger than 7, we aim to approve your plan within **90 days** after you become a participant.

If you're 7 or older, we aim to approve your first plan within **56 days** after you become a participant.

What do we think about when we approve your plan?

When we approve your plan, we must:

- think about your [goals](#)⁸⁰
- consider any assessments about your support needs⁸¹
- decide that each support meets the [NDIS funding criteria](#), and as a package of supports⁸²
- decide if we need to reduce the amount of funding in your plan because you can get [compensation](#) outside the NDIS⁸³
- consider the principle that you should manage your plan as much as you want to⁸⁴
- think about how your previous plans have worked for you, including how well they met your disability support needs.⁸⁵

We also consider the principles about plans.⁸⁶ These principles include things like:

- Your plan is just for you.
- Your plan will work alongside other supports you can get outside the NDIS, like informal, community and mainstream supports.
- Your plan should give you as much choice and independence about your life as possible.

You can read the full list of principles about plans in the [NDIS Act](#).

What happens once you have your plan?

Once we approve your plan, you'll get a copy within **7 days**.⁸⁷ We'll ask how you'd like to receive your plan.



We usually send it out by mail. You can also find it on the [myplace participant portal](#) and my NDIS app as soon as we approve it.

If you have a nominee or child representative, they'll get a copy too. You can also ask us to share it with other people. We can only share your plan where you ask us to. Learn more about [your privacy and information](#).

Once you have a plan, you can start using it to buy your supports. Your plan officially 'starts' on the day we approve it.⁸⁸ Your My NDIS Contact or support coordinator can help you start using your plan.

We can only pay for supports you buy after your plan starts.

Your plan ends when we create a new one, or you [leave the NDIS](#).⁸⁹ Your plan doesn't expire or stop, even if we haven't created a new plan by the plan reassessment date. You are never left without funding or supports.

Sometimes we'll need to suspend your plan. This usually happens when:

- you're overseas for more than 6 weeks – there are some situations where we can extend the 6-week period
- [you don't claim compensation](#) you're entitled to after we ask you to, for example after you've sustained an injury.

Learn more about [plan suspensions](#).

What happens during a check-in?

During your plan, we'll check in with you to see how you're going, and how your plan is working for you. We may check in with you:

- at regular intervals, for example each year
- if we think your plan might not be working for you, for example if you're using too much or too little of your supports.
- if you would like help to use the supports in your plan.

We usually talk with you about:

- how you're going with your goals
- if your plan and funding is working well for you
- if your situation has changed.

After our check-in, we may need to vary or create and approve a new plan for you. This might be because your plan is due for reassessment or because your plan doesn't meet your needs. Learn more about [changing your plan](#).



If your plan is working well for you and your supports still meet the [NDIS funding criteria](#), we could give you a new plan with the same supports. Your new plan might also have less supports if there are some you no longer need. Or you might need a plan with more support.

We'll make this decision based on your support needs, the principles we follow to create your plan and the [NDIS funding criteria](#).

We'll check each support is reasonable and necessary, as well as when considered as a package.

Learn more about check-ins in [Our Guideline – Your plan](#).

Can you change your plan?

Once it's approved, your plan can be changed. We can also create a new plan if you need one.⁹⁰

If you want to change the information about you and your goals, we can change your plan to include this.⁹¹ This new plan will have the new statement about you and your goals. It'll have the same supports.⁹²

You can also request a change to your plan at any time. Please get in contact with your My NDIS Contact or support coordinator if you'd like to request one. We also have [a form you can complete](#).

Learn more about [changing your plan](#).

What if you don't agree with your plan?

If you're not happy with your plan, you should talk to your My NDIS Contact.

They may be able to explain the decision, clarify how you can use the funding, or help you fix any problems.

It's a good idea to do this soon after you get your plan.

We'll give you written reasons on why we made the decision. [Contact us](#) if you'd like to discuss the reasons for our decision.

If you don't agree with our decision to approve your plan, you can ask for an internal review. Your My NDIS Contact or support coordinator can help you ask for an internal review. We also have [a form you can complete](#).

Having an internal review means someone who wasn't involved in creating your plan will review our decision to approve your plan. They'll consider if we made the right decision under the laws for the NDIS. An internal review is different to a change or plan reassessment after a check-in or when your situation changes.

Once you get your plan, you have 3 months to ask for an internal review.⁹³

Learn more about [reviewing our decisions](#).

Appendix A: Plan duration guidance

Below is a guide on how long we usually make your plan before we must reassess it. When we decide the plan reassessment date, we always consider:

- how long you want your plan to go for before we change your plan
- your current situation.

For children younger than 7, we recommend a plan length of one year. This is due to the major changes in early childhood. Sometimes, we can do a plan for up to 3 years for young children, if it is better aligned with important transition points and milestones. Learn more in [Our Guideline – Early childhood approach](#).

During your plan, we'll check in with you to see how you're going, and how your plan is working for you. Remember you can ask to change your plan at any time.

Plan duration criteria	Recommended plan duration	Recommended plan duration
	Aged 7 and older	Younger than 7
Your living situation and support needs are stable.	3-5 years	1-2 years
You are in an unstable living situation, for example if you are homeless or in temporary accommodation.	1 year	1 year
You are likely to leave the NDIS in the next year. For example, if you were eligible for the NDIS through the early intervention requirements., You may have built your skills, or still need to finish some skill development. You might need a 1 year plan if you still need to finish your skill development	1 year	1 year
You need more than \$25,000 per year in Capacity Building supports.	Not applicable	1 year
You need more than \$15,000 per year in Capacity Building supports	1 year	Not applicable

Plan duration criteria	Recommended plan duration	Recommended plan duration
	Aged 7 and older	Younger than 7
You have used less than 20% of your NDIS funding in your current plan.	1 year	1 year
You currently receive compensation or may be eligible for compensation.	1 year	1 year
You are a younger person in residential aged care aged under 65, or Indigenous and under 50, and you: <ul style="list-style-type: none"> • have a goal to change your living situation or move home • only have cross-billing fees, or have additional aged care related fees that are likely to change • are living in, at risk of entering, or transitioning out of an aged care facility. 	1 year	Not applicable
You live in residential aged care and are 65 years or older, or you are Indigenous and aged 50 years or older, and you: <ul style="list-style-type: none"> • want a 2 year plan • only have cross-billing fees in your plan • have stable support needs and circumstances • are using the right amount of funding in your plan • don't have a goal to explore alternate housing goals. 	2 years	Not applicable

Plan duration criteria	Recommended plan duration	Recommended plan duration
	Aged 7 and older	Younger than 7
You need disability-related health supports and: <ul style="list-style-type: none"> • your health support needs are unstable • your function is expected to change in the next year • we ask you to get an assessment so we can understand your support needs. 	1 year	1 year
You need behavioural support.	1 year	1 year
Your plan will include in-kind supports.	1 year	1 year

Reference list

¹ NDIS Act and delegated legislation made under the NDIS Act, especially NDIS (Supports for Participants) Rules and NDIS (Plan Management) Rules.

² NDIS (Supports for Participants) Rules r 5.1(b).

³ NDIS Act s 34(1)(a).

⁴ NDIS Act s 34(1)(b).

⁵ NDIS Act s 34(1)(c).

⁶ NDIS (Supports for Participants) Rules r 3.1(c).

⁷ NDIS Act s 34(1)(c); NDIS (Supports for Participants) Rules r 3.1(a).

⁸ NDIS Act s 34(1)(d).

⁹ NDIS Act s 34(1)(e).

¹⁰ NDIS Act s 34(1)(f).

¹¹ NDIS Act s 34(1)(f).

¹² NDIS (Supports for Participants) Rules part 5.

¹³ NDIS (Supports for Participants) Rules r 5.1(a).

¹⁴ NDIS (Supports for Participants) Rules r 5.1(b).

¹⁵ NDIS (Supports for Participants) Rules r 5.1(c).

¹⁶ NDIS (Supports for Participants) Rules r 5.1(d).

¹⁷ NDIS (Supports for Participants) Rules r 5.3(a).

¹⁸ NDIS (Supports for Participants) Rules r 5.3(b).

¹⁹ NDIS Act s 34(1)(f).

²⁰ NDIS Act s 118(1)(b).

²¹ NDIS Act s 4(17)(b).

²² NDIS Act s 33(2).

- 23 NDIS Act s 33(5)(a).
 24 NDIS Act s 34(1)(a).
 25 NDIS Act s 34(1)(d).
 26 NDIS (Supports for Participants) Rules r 4.1(d).
 27 NDIS Act s 34(1).
 28 NDIS Act s34(1)(d); NDIS (Supports for Participants) Rules, r 3.2-3.3.
 29 NDIS Act s34(1)(d); NDIS (Supports for Participants) Rules, r 3.2-3.3.
 30 NDIS Act s 33.
 31 NDIS Act s 31.
 32 NDIS Act s 33(1).
 33 NDIS Act s 33(1).
 34 NDIS Act s 33(8).
 35 NDIS Act s 34(1)(a).
 36 NDIS Act s 34(1)(a).
 37 NDIS Act s 4(4).
 38 NDIS Act s 118(1)(a)(v).
 39 NDIS (Supports for Participants) Rules r 5.1(a).
 40 McGarrigle v National Disability Insurance Agency (2017) 157 ALD 520 at [88].
 41 NDIS Act s 13.
 42 NDIS (Supports for Participants) Rules r 2.4; NDIS Act s 33(5)(c)
 43 NDIS Act s 33(3); NDIS (Plan Management) Rules r 6.2.
 44 NDIS Act s 33(3); (NDIS (Plan Management) Rules r 6.3.
 45 NDIS Act s 36(2)(a).
 46 NDIS Act s 36(2)(b)(i).
 47 NDIS Act s 36(2)(b)(ii).
 48 NDIS Act s 36(2)(a).
 49 NDIS Act s 36(3).
 50 NDIS Act s 36(3).
 51 NDIS Act s 42(2).
 52 NDIS Act s 42(1).
 53 NDIS Act s 46(1).
 54 NDIS Act ss 33(2)(d); 42(2).
 55 NDIS Act s 33(6).
 56 NDIS Act s 74(2).
 57 NDIS Act ss 43(2), 44.
 58 NDIS Act s 43(6)(e).
 59 NDIS Act s 47A
 60 NDIS Act 43(2).
 61 NDIS Act s 43(3)(c).
 62 NDIS Act ss 43(6)(d), 74(4)(a).
 63 Bankruptcy Act 1966 (Cth) s 50, pt X div 2.
 64 Bankruptcy Act 1966 (Cth) pt X.
 65 Bankruptcy Act 1966 (Cth) pt IX.
 66 NDIS Act s 43(3)(d).
 67 NDIS Act ss 43(6)(e), 74(4)(b)(i)
 68 NDIS (Plan Management) Rules rr 3.8(a)-(b).
 69 NDIS (Plan Management) Rules rr 3.8(c)-(d).
 70 NDIS (Plan Management) Rules r 3.8(d).
 71 NDIS (Plan Management) Rules r 3.8(d).

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- ⁷² NDIS (Plan Management) Rules r 3.8(f).
⁷³ NDIS (Plan Management) Rules r 3.8(e).
⁷⁴ NDIS (Plan Management) Rules rr 3.8(f)(ii), 3.9.
⁷⁵ NDIS Act s 80(1); NDIS (Nominees) Rules rr 5.3-5.6.
⁷⁶ NDIS Act s 43(3)(4).
⁷⁷ NDIS Act s 33(6).
⁷⁸ NDIS Act s 33(2)(c).
⁷⁹ NDIS Act s 33(4).
⁸⁰ NDIS Act s 33(5)(a).
⁸¹ NDIS Act s 33(5)(b).
⁸² NDIS Act, ss 33(5)(c), 34, NDIS (Supports for Participants) Rules.
⁸³ NDIS Act, s 33(5)(d), NDIS (Supports for Participants – Accounting for Compensation) Rules.
⁸⁴ NDIS Act, s 33(5)(e).
⁸⁵ NDIS Act, s 33(5)(f),
⁸⁶ NDIS Act s 31.
⁸⁷ NDIS Act s 38.
⁸⁸ NDIS Act s 37(1).
⁸⁹ NDIS Act s 37(3).
⁹⁰ NDIS Act s 37(2).
⁹¹ NDIS Act s 47(1).
⁹² NDIS Act s 47(2).
⁹³ NDIS Act s 100(2).



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Complete the Guided Planning Questions

This Standard Operating Procedure will support you to record responses to the Guided Planning Questions in the National Disability Insurance Scheme Business System (System).

The Guided Planning Questions:

- explore the participant's disability-related support needs across life domains
- help you understand how the participant is managing everyday activities and who supports them
- influence decision making around reasonable and necessary funding
- provide important information about the participant which helps the National Disability Insurance Agency track the progress of the Scheme and make improvements.

Note: The age range is changing for the NDIS early childhood approach. From July 1 2023, the age will change to include children younger than 9. The change will be rolled out over the next 2 years. Early childhood partners will need to use this resource to plan for children aged 7 or 8.

1. Recent updates

Date	What's changed
July 2023	Updates to support early childhood partners to plan for children aged 7 or 8.



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2. Checklist

Topic	Checklist
<p>Pre-requisites</p>	<p>You have read and understood:</p> <ul style="list-style-type: none"> <input type="checkbox"/> the Conversation Style Guide <input type="checkbox"/> Our Guideline – Creating Your Plan <input type="checkbox"/> the information in the Capacity Building, Employment, and Education Short Forms Outcomes Framework (SFOF) summaries in the Update the Guided Planning Questions task. <input type="checkbox"/> the Age range change. <p>You have:</p> <ul style="list-style-type: none"> <input type="checkbox"/> started the planning conversation with the participant.
<p>Actions</p>	<ul style="list-style-type: none"> <input type="checkbox"/> 3.1 Prepare for the conversation <input type="checkbox"/> 3.2 Understand the types of Guided Planning Questions <input type="checkbox"/> 3.3 Answer the Guided Planning Questions <input type="checkbox"/> 3.4 Next steps



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3. Procedure

3.1 Prepare for the conversation:

- use the conversation with the participant to select the appropriate answers and update pre-populated answers where necessary.

Note: Some fields may be pre-populated from the Outcomes Questionnaires.

- use your interpersonal skills and the [Conversation Style Guide](#) to have a person-centred conversation that is free-flowing.
- avoid asking the questions directly from the form
- use the questions as a guide to help you check that you are gathering the information you need.
- avoid selecting **I don't know/Unsure** or **Blank/unanswered** when entering responses as this may result in a Typical Support Package that does not reflect the participant's actual circumstances.

Note: Depending on the answers you select additional questions may appear on the form.

For participants younger than 9

If the participant is aged 7 or 8, follow steps in this Standard Operating Procedure to:

- answer the guided planning questions, and
- generate a limited Typical Support Package.

If the participant is younger than 7, you must:

- not submit the Guided Planning Questions
- only use the questions to help you to decide which reasonable and necessary support to include in the plan.

3.2 Understand the types of Guided Planning Questions

1. Review the following information:

- The first two questions on the Guided Planning Questions form are **Introduction Questions**.



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- All other questions on the form are **Core Questions**.
- **Core Questions** are about the different types of support a participant can receive.
- The following sections of this Standard Operating Procedure will help you provide answers for each type of **Core Question**:
 - [3.3.1 Consumable supports](#)
 - [3.3.2 Capacity Building supports](#)
 - [3.3.3 Transport](#)
 - [3.3.4 Behaviours of concern](#).

3.3 Answer the Guided Planning Questions

1. In **Pre-planning – Staff Tasks**, select the **Update the Guided Planning Questions** task.
2. The **Update the Guided Planning Questions** task opens. Read the **Note on administration of questions**.

✓ Note on administration of questions

Please note, response options should not be read out to the participant/nominee. Rather, the Planner/ LAC should choose the most appropriate response, based on what was said by the respondent (i.e. interview/ conversation style, rather than survey-style).

> Introduction and core questions

> Capacity building summary from SFOF

> Employment summary from SFOF

> Education summary from SFOF



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3. Select (or type) the response to each question in order.

Introduction and core questions

The next set of questions are about your (the participant's) individual circumstances, how you (the participant) currently manage/s everyday activities, what supports are in place, and whether these are sufficient and sustainable.

* Who do you currently live with?:

* What are your current housing arrangements?:

4. At any time, you can select **Save** and return to complete the form later. When the form is complete, select **Submit**.

Important: You should not **Submit** guided glanning questions for participants aged under 7. You can select **Save** to record the answers.

Form has been saved 12:26 AM Save Submit

5. When you submit the form a confirmation message appears. Select **Close**.

3.3.1 Consumable supports

Review this information before answering questions about consumable supports:

- Consumable support has different levels for [adults](#) and [children](#).
- Continence products include catheter consumables such as tubing and bags.
- Some disability-related health supports can be funded through the healthcare system and may not meet reasonable and necessary criteria.
- Support the participant to navigate other service systems to ensure they get the disability-related health support they need.
- Use [Our Guideline – Disability-Related Health Supports](#) to support your reasonable and necessary decision making.

3.3.1.1 Consumable products for adults (18+)

1. Select the appropriate level of consumables support from the drop-down box in the field **Do you currently use any consumable products?**



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* Do you currently use any consumable products (e.g. continence products or tube feeding for getting your food)? Select the option that best describes your use.:

* Will you need help to arrange and manage supports on an ongoing basis? Select the option that best describes the participant's answer and reflects their streaming and guidelines. Do not read the response options to the participant/ respondent.:

* Discuss goals with the respondent. What level of capacity building is required? Refer to section labelled "Capacity building summary from SFOF" below to assist in answering this question.:

▼

Adult level 1 – high use, higher cost

Adult level 2 – high use, moderate cost

Adult level 3 – high use only, or moderate use and higher cost

Adult level 4 – moderate use, moderate cost

Adult level 5 – low to moderate use, low to moderate cost

Adult level 6 – low use, low cost

Adult level 7 – None necessary

2. Use your conversation with the participant, and the information you gather about their life and support needs, to select the most appropriate option. Use the examples below as a guide:

- **Example 1:** The participant uses six or more continence products per day and higher cost tube feeding – Adult level 1.
- **Example 2:** The participant uses four to six continence products and low cost tube feeding. Or they use high cost tube feeding and less than four continence products – Adult level 4.
- **Example 3:** The participant uses continence products only (less than four) or, low cost tube feeding only – Adult level 6.

3.3.1.2 Consumable products for children (0-17)

1. Select the appropriate level of consumables support for children from the drop-down box, in the field **Does the child currently use any consumable products?**

* Does the child currently use any consumable products (e.g. continence products or tube feeding for getting your food)? Select the option that best describes the child's use. Do not consider continence products if the child is 5 years and under.:

* Will you need help to arrange and manage supports on an ongoing basis? Select the option that best describes the participant's answer and reflects their streaming and guidelines. Do not read the response options to the participant/ respondent.:

▼

Child level 1 – high user only, or moderate use and higher cost

Child level 2 – moderate use, moderate cost

Child level 3 – low to moderate use, low to moderate cost

Child level 4 – low use, low cost

Child level 5 – None necessary



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2. Use reasonable and necessary decision making and the examples below as a guide.
 - **Example 1:** The child uses 6+ continence products per day and higher cost tube feeding - Child level 1.
 - **Example 2:** The child uses 4-6 continence products and low cost tube feeding or, high cost tube feeding and less than 4 continence products - Child level 2.
 - **Example 3:** The child uses less than 4 continence products and low cost tube feeding - Child level 3.
 - **Example 4:** The participant uses continence products only (less than 4) or, low cost tube feeding only - Child level 4.

3.3.2 Capacity Building supports

1. Review participant's goals.

Note: You would have already used:

- [Standard Operating Procedure – Complete the Participant Statement](#) to support the participant to identify their goals and the steps they can take to work towards them
- [Setting goals web page](#) to discuss how supports help the participant pursue their goals
- [Our Guideline – Creating Your Plan](#) to help you make decisions about the Capacity Building supports you will include in the plan.

2. Review the Short Form Outcomes Framework (SFOF) Capacity Building summaries.

Note: These summaries are populated from the Outcomes Questionnaires. You would have completed the Outcomes Questionnaires as part of the following procedures:

- [Standard Operating Procedure – Complete the Update the Outcomes Questionnaire task](#)
- [Standard Operating Procedure – Complete Update the Family Questionnaire task.](#)

These procedures must be completed prior to the Guided Planning Questions.

3. Review the following information:

Use **Table 1** to consider if the participant's goals are simple or complex.



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Important: It is up to the participant to decide how far they want to pursue their goal. You will only consider if the participant's goals are simple or complex so you can select the appropriate level of Capacity Building support in the System.

The System allows you to enter the level of Capacity Building support as:

- **None**
- **Low**
- **Moderate**
- **High**
- **Very high, or**
- **I don't know/unsure**

Use **Table 2** to help you understand the different levels of Capacity Building support. **Table 2** provides you with some examples of what the different levels of Capacity Building supports mean, and how these help the participant work towards their goals.

Important: Every participant is different and their life circumstances are unique. You will use the examples in the tables as a guide only.

Table 1: About simple and complex goals

Simple goals:	Complex goals
<ul style="list-style-type: none"> • Are likely to be short-term. • The participant and the people who support them can easily identify steps to work towards it. 	<ul style="list-style-type: none"> • Are likely to be medium to long-term. • You will need to work with the participant, and the people who support them, to identify how to work towards the goal. • You may need to request progress reports to understand how supports are helping the participant to work towards the goal.
<p>Examples of simple goals:</p> <ul style="list-style-type: none"> • improving mobility - learning to use a walking aid • improving independence in self-feeding 	<p>Examples of complex goals:</p> <ul style="list-style-type: none"> • improving life skills to be able to move into more independent living



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Simple goals:	Complex goals
<ul style="list-style-type: none"> travel training to learn a single mode of transport for a limited number of regular trips learning to tell the time cooking a meal with supervision and ingredients provided learning to use a memory device. 	<ul style="list-style-type: none"> learning how to travel independently using various modes of transport and unfamiliar routes relationship based goals addressing behaviours of concern.

Table 2: Understanding the different levels of capacity building support

Level of Capacity Building support	Example
None	<ul style="list-style-type: none"> The participant only has simple goals in their plan and can work towards these with support from informal, community or mainstream supports. If you enter None this means that the participant can work towards their goals without any funded Capacity Building support.
Low	<ul style="list-style-type: none"> The participant may have one simple goal in their plan that requires some support to work towards. If you enter Low this means they may be able to work towards this goal with support from one provider, such as an allied health professional or support worker.
Moderate	<ul style="list-style-type: none"> The participant has up to three simple goals in the plan that require some support to work towards.



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Level of Capacity Building support	Example
	<ul style="list-style-type: none"> • They might need support from a few different support providers or allied health professionals to work towards their goal. • For example, a participant may want to work towards being able to use transport independently. To do this they might need some help from an Occupational Therapist to understand how to get to the bus stop and buy a ticket, and help from a Speech Therapist to be able to communicate with the bus driver. • Entering Moderate usually means the participant can work towards their goal during the current plan period.
High	<ul style="list-style-type: none"> • The participant has up to four simple goals and one complex goal in their plan. • They might need help from a few different allied health professionals and a support worker to work towards their goal. • For example, a participant might need to have a support worker travel with them on the bus to build their independence, as well as work with the Occupational Therapist and Speech Therapist to support their communication and planning skills. • Entering High usually means that the participant's goals are long-term and something they will work towards over more than one plan period.
Very High	<ul style="list-style-type: none"> • The participant has more than one complex goal in their plan and requires some behaviour support to be able to work towards their goals.



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Level of Capacity Building support	Example
	<ul style="list-style-type: none"> You would have already referred to Practice Guide – Positive Behaviour Supports and Behaviours of Concern if you have decided that behaviour supports are reasonable and necessary to support the participant to work towards their goals.
<p>I don't know/Unsure</p>	<ul style="list-style-type: none"> Using this response may mean the participant does not receive the appropriate level of support to help them work towards their goals. You will avoid using this response as much as reasonably possible.

4. Select the appropriate level of support from the drop-down box in the field **Discuss goals with the respondent. What level of Capacity Building is required?**

3.3.3 Transport

1. If you answer **Yes** for the question **Do you need support for travel & transport?**, record bank account details using [Standard Operating Procedure – Collect and Update Bank Account Details](#).



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3.3.4 Behaviours of concern

Important: Do not read out the Behaviours of Concern questions. Use your interpersonal skills to get the right information.

1. If there are behaviours of concern, select **Yes** from the drop-down box for the question **Are there any behaviours of concern.**

* [Not to be asked of the participant] Are there any behaviours of concern (e.g. verbal/physical aggression; inappropriate sexual or social behaviour; lack of initiation)?:

Yes

No

I don't know/Unsure

2. Select the most appropriate answer from the drop-down box to the question **What behaviours does the participant demonstrate.**

Note: Do not select the **blank/unanswered** option. You should answer no to the previous question if there are no behaviours of concern.

* [Not to be asked of the participant] What behaviours does the participant demonstrate (e.g. escapes secure premises; attacks others; breaks objects/ smashes windows)? Please select the option that best describes the impact and frequency of the behaviour:.

Additional Information:

One or more significant (high impact) behaviours of concern at any frequency

More than three behaviours of concern (moderate impact) at any frequency

Up to three behaviours of concern (moderate impact) at any frequency

One or more behaviours of concern (minor impact) that occur at least daily

More than three behaviours of concern (minor impact) that occur less often than daily

Up to three behaviours of concern (minor impact) that occur less often than daily

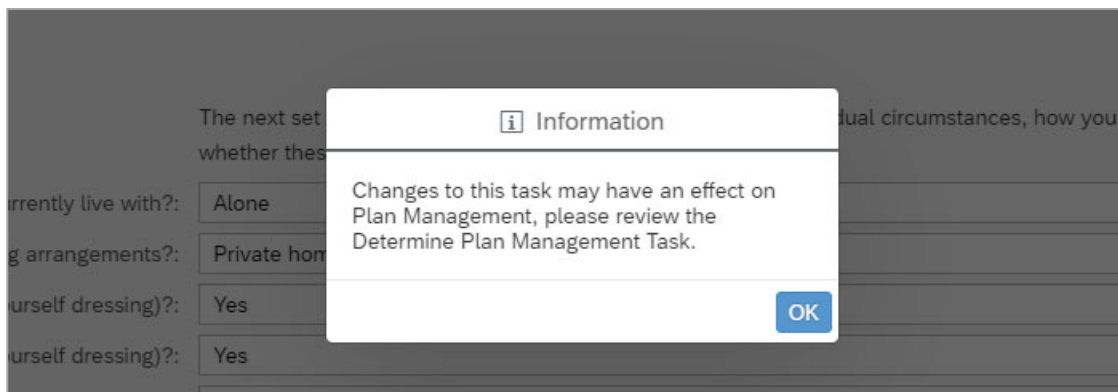
Blank/Unanswered

3. Select **Submit**.
4. Does a success message display?
 - Yes, go to [section 3.4 Next steps](#)
 - No, an alert will display asking you to review the Determine Plan Management Task. Select **OK**.



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5. Success message displays. Select **OK**.

3.4 Next Steps

1. Complete the Planning Conversation Tool using [Standard Operating Procedure – Complete the Planning Conversation Tool](#).

4. Related procedures or resources

- [Our Guideline – Creating Your Plan](#)
- [Standard Operating Procedure – Collect and Update Bank Account Details](#)
- [Standard Operating Procedure – Complete the Planning Conversation Tool](#)
- [Standard Operating Procedure – Complete the Update the Outcomes Questionnaire task](#)
- [Standard Operating Procedure – Complete Update the Family Questionnaire task.](#)

5. Feedback

If you have any feedback about this standard operating procedure, please complete our [Feedback Form](#).



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6. Version control

Version	Amended by	Brief Description of Change	Status	Date
1.0	s22(1)(a)(i) - irrelevant ma	Class 2 Approved Standard Operating Procedure moved to the new Standard Operating Procedure format to be used with Our Guideline – Creating Your Plan	APPROVED	2021-02-28
2.0	s22(1)(a)(i) - irrelevant ma	Class 1 approved. Added a step to explain what do to when you submit the guided planning questions and an alert displays. This alert asks you to review the plan management type in the Determine Plan Management task.	APPROVED	2021-08-26
3.0	s22(1)(a)(i) - irrelevant ma s22(1)(a)(i) - irrelevant ma	Class 2 approved. Updated to align with the early childhood age range change. Updates to support early childhood partners to plan for children aged 7 or 8.	APPROVED	2023-06-19



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Complete the Participant Statement

This Standard Operating Procedure will support you to record and update the participant statement in the NDIS Business System (System) during the planning conversation.

If you need to update the participant statement as part of an administrative change task refer to [Standard Operating Procedure – Create an administrative change task](#).

1. Recent updates

Date	What's changed
June 2023	<p>Updates include:</p> <ul style="list-style-type: none"> Section 3.1 - guidance about identity and including people's preferred name and pronouns in the participant statement. Link to our new Fact sheet - Updating your name, pronouns and information about your gender.
February 2021	<p>New Standard Operating Procedure format to align with Operational Guidelines refresh. Standard Operating Procedures include process information only. Use Operational Guidelines to help you make decisions and refer to Related procedures or resources.</p> <p>Standard Operating Procedure has been updated to include steps on how you can record more participant goals than the System allows.</p> <p>Process to update the participant statement as part of an administrative change task has been moved to Standard Operating Procedure – Create an administrative change task.</p>

2. Checklist

Topic	Checklist
Pre-requisites	<p>You have:</p> <ul style="list-style-type: none"> <input type="checkbox"/> read and understood Our Guideline – Creating your plan <input type="checkbox"/> read and understood the Setting goals web page <input type="checkbox"/> read and understood the Conversation Style Guide



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Topic	Checklist
	<ul style="list-style-type: none"> <input type="checkbox"/> read and understood either <ul style="list-style-type: none"> o Standard Operating Procedure – Prepare and complete the planning conversation for the participant’s first plan o Standard Operating Procedure – Prepare for the ongoing check-in conversation <input type="checkbox"/> read and understood the Participant Experience Delivery (PED) Key Performance Indicators (KPIs) and are complying with the PED KPI relevant to this task <input type="checkbox"/> started the planning conversation.
Actions	<ul style="list-style-type: none"> <input type="checkbox"/> 3.1 Understand the purpose of the participant statement <input type="checkbox"/> 3.2 Complete the participant statement <input type="checkbox"/> 3.3 Record more goals than the System allows <input type="checkbox"/> 3.4 Next steps

3. Procedure

3.1 Understand the purpose of the participant statement

The participant’s statement of goals and aspirations tell their story. It is a comprehensive picture of their:

- identity (including their pronouns, and how they wish to be spoken to and about)
- life circumstances
- goals, or things they want to work towards, and
- existing supports, including informal and mainstream supports.

When we say identity, we mean the values, culture and traits that make a person unique.

Identity is important for everyone as it allows us to live authentically. For example, some participants might tell you they have a preferred name, or pronouns that affirm their gender.

You will provide a respectful experience by putting their preferred name and pronouns in the participant statement, while continuing to write in the participant or child representative’s own words. For more information, read [Fact sheet - Updating your name, pronouns and information about your gender.](#)



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Some participants may find it difficult to communicate with spoken word. This does not mean they do not have a unique story to share.

You will support participants with communication difficulties to complete their statement. You might do this by:

- supporting them to communicate using a communication device
- finding out who helps them communicate and make decisions in their life
- supporting the people who help them communicate to contribute to the participant statement.

Many participants with communication difficulties can make their own decisions. If a participant has a plan nominee or guardian who make decisions on their behalf, you will:

- work with them to complete the participant's statement
- include the participant in the completion of their statement, as much as possible.

3.2 Complete the participant statement

The participant can have as many goals as they like. You will support the participant by **recording all of their goals** in the System.

At least one goal must be a short-term plan goal. The participant can also have medium to long term plan goals.

1. Work with the participant to identify their goals and the steps they can take to work towards them.

The System will allow you to record:

- four steps for both short and medium to long term plan goals
- two short term plan goals in the **My Plan Goals** section
- five medium to long term plan goals in the **My Medium to Long Term Life Goals** section
- additional short and medium to long term goals in the free text field.

2. Review the information the participant has given you about their goals:

- Use information the participant has given you, for example if they have completed [Booklet 2 – Creating your NDIS plan](#), to complete the Participant Statement.



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- If the participant has not brought any information with them, you can use [Booklet 2 – Creating your NDIS plan](#) and the [Setting goals web page](#) to help guide your conversation.
3. In **Pre-planning – Staff Tasks**, select the **Complete the Participant Statement** task.
 4. The **NDIS Participant Statement** form opens.

5. Ask the participant to tell you about their current living arrangements, relationships and supports. Record the information in the **Living Arrangements, Relationships and Current Supports** field.

6. If the participant has future housing needs, record this in the Details - Housing and Accommodation section of the System. Refer to [Standard Operating Procedure - Update person details](#). This is important if the participant has a goal to enter/exit a Residential Aged Care Facility.



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7. Ask the participant to tell you about their daily life. Record their answer in the **Daily life – Describe your day to day life** field.

<p>* Daily life - Describe your day to day life:</p>	<p>Every morning during the week I wake at around 7am and my mum supports me making sure I am ready to leave the house and catch the bus to work by 8:30am. I work at a café and really like it. The best bit is that I can try lots of different things during the day. I was really excited when I got a promotion earlier this year. I work hard every day and am usually tired when I get home. Sometimes I help Dad prepare the family meal before relaxing on my computer. I really like using the computer and people tell me I am good at it.</p>
--	---

Note: If the participant does not want to include some information in their participant statement, record the reason in an **interaction** in the System. For example, ‘the participant discussed their living arrangements at the face to face meeting but did not want this to be included on their plan as they were seeking to keep this information confidential.’

8. Ask the participant to tell you their goals and the steps they will take to work towards pursuing their goals. You can use the following guidance to support you:
- [Setting goals web page](#)
 - For plan reviews:
 - discuss goals from the previous plan and review how the funded supports in their plan helped them pursue their goals
 - celebrate the participant’s successes
 - follow up what may not have worked well and talk about next steps to develop new goals.
 - Discuss how the participant is currently being supported by their mainstream, community and informal supports. Explore the ongoing availability and suitability of these supports in assisting the participant to work towards their goal/s. The information recorded in the **How I will be supported** field will be visible in the goals section of the participant’s plan.
 - You will record goals the way the participant wants you to record them. You should read the goal back to the participant to confirm you have understood and recorded the goal in their words.
 - For a child aged 0-6 years, record goals in the child representative’s words.



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9. Record the participant's plan goals in their own words:

- Record short-term plan goals in the **My Plan Goals** section.

My Plan Goals

What are your objectives that you are hoping to achieve through your plan?

* My Plan Goal 1:

Goal Type:

- Record medium to long term goals in the **My Medium to Long Term Life Goals** section.

My Medium to Long Term Life Goals

Record the goals applicable to the participant:

Goal:

Goal Type:

10. Select the most appropriate **Goal Type** from the drop down list.

My Plan Goals

What are your objectives that you are hoping to achieve through your plan?

* My Plan Goal 1:

Goal Type:

Please select one or more support types associated to the goal:

Core:

Capacity Building:

Capital:

How I will achieve this goal:

Note: You must record the participant's goals for social and/or economic participation.

11. Select one or more support types in the **Please select one or more support types associated to the goal** section. To do this think about the types of support that may be



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needed. Tick the relevant checkboxes.

* My Plan Goal 1:

Goal Type:

Please select one or more support types associated to the goal:

Core:

Capacity Building:

Capital:

- You will be able to see the participant’s goals in the relevant support type screen of the **Determine Funded Supports**.

Support Type > Support Category

Support Category	Price \$	Comment	Periodic
Consumables	520.20		
Daily Activities	10,000.00	I can use my core support funding flexibly to help with my everyday activities, my current disability related	
Social, Community and Civic Participation	9,479.80		
Transport	2,472.00	Includes support to get to work or travel to participate in social and community activities	<input checked="" type="checkbox"/>

Participant Goals

Goal Category	Goal Type	Goal
Plan Goals	Daily life	I would like to learn how manage my own money so that I can pay for things myself and save money so that I can go on holiday with my friends

If a support type is ticked, the goal will also appear in the relevant **Core, Capacity Building** or **Capital** funded supports section in the participant’s plan (if the support type is funded). Support types with no funding included will not display on the participant’s plan.

- Record the participant’s first step to working towards their goal in the **How I will achieve this goal** field. Use action words and positive language to describe a specific measurable activity. For example, to ‘develop a budget’ is a positive step rather than ‘to



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stop spending money on certain things’.

How I will achieve this goal:



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- 14. Record all non-funded supports that help the participant pursue their first step in the **How I will be supported** field. You can record multiple supports. Talk with the participant about any current supports that can help them. If there are gaps in supports, encourage the participant to start thinking of new mainstream and community services they can access.

How I will be supported:	I can access Centrelink support to determine my job capacity and mainstream eligibility to DES. My LAC will support me to connect to services for employment supports.
--------------------------	---

- 15. To add another step to work towards the same goal select **Yes** at **Do you want to add another step to achieving this goal?** This will add new fields. Record step two of achieving the goal and all relevant supports.

Note: The **How I will achieve this goal** and **How I will be supported** fields are not mandatory for early childhood participants (aged 0-6).

Do you want to add another step to achieving this goal?: <input checked="" type="radio"/> YES	
How I will achieve this goal:	Learn how to look for work and start applying for jobs.
How I will be supported:	My LAC will support me to connect to a service which can help me to develop my job searching skills.

- 16. Add a second short term goal or up to four more medium to long term goals. To do this select **Yes** at **Do you want to add another goal?**

Do you want to add another goal?: <input checked="" type="radio"/> YES	
Goal:	



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3.3 Record more goals than the System allows

1. Record additional short and medium to long term goals in the free text field. Go to the last goal in the **NDIS participant statement** form.
2. Select **Yes** at **Do you want to add another step to achieving this goal?** Use the first free text field to record information about the additional goal. Repeat this step for every additional participant goal.

Do you want to add another step to achieving this goal?: YES

How I will achieve this goal:

Goal:
Short or Medium-Long Term:
Goal Type:
Support Type:
How I will pursue this goal:
How I will be supported:

Note: You should ensure that additional goals recorded in a free text section reflect the format used in the **NDIS participant statement** form. When recording the additional goal include the following headings:

- Goals
 - Goal Type
 - Support Type
 - How I will pursue this goal
 - How I will be supported
3. At any time you can select **Save** to save the form and return to complete it later. When the form is complete, select **Submit**.

[Change History](#) Form has been saved 9:49 AM [Save](#) [Submit](#)

Important: The information in the **Participant Statement** will print in the participant's NDIS Plan. Please pay close attention to your spelling and grammar before submitting the task.

4. When you submit the form, a confirmation message appears. Select **Close**.

3.4 Next Steps

1. Record the names and contact information of relevant relationships identified by the participant in the System. This may include details of the participant's family or carers. Refer to the following Standard Operating Procedures for more information:



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- [Standard Operating Procedure – Appoint or decline a Nominee](#)
 - [Standard Operating Procedure – Suspend or cancel a Nominee](#)
 - [Standard Operating Procedure – Record the child representative request](#)
2. Complete any remaining **Pre-Planning tasks**. Use the [Standard Operating Procedure – Prepare and complete the planning conversation for the participant’s first plan](#) to identify which tasks need completing.
 3. Review the **Participant Statement** at each plan review to ensure it reflects the participants current situation.

4. Related procedures or resources

- [Our Guideline – Creating your plan](#)
- [Booklet 2 – Creating your NDIS plan](#)
- [Conversation Style Guide](#)
- [Fact sheet - Updating your name, pronouns and information about your gender.](#)
- [Setting goals web page](#)
- [Standard Operating Procedure – Update person details](#)
- [Standard Operating Procedure – Record informal, community and mainstream supports](#)
- [Standard Operating Procedure – Appoint or decline a nominee](#)
- [Standard Operating Procedure – Suspend or cancel a Nominee](#)
- [Standard Operating Procedure – Determine or revoke a child representative](#)

5. Feedback

If you have any feedback about this Standard Operating Procedure, please complete our [Feedback Form](#).



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6. Version control

Version	Amended by	Brief Description of Change	Status	Date
1.0	s22(1)(a)(ii) - irrelevant ma	<p>Class 1 Approved</p> <p>New SOP to align with Our Guidelines refresh. SOP provides guidance on how to:</p> <ul style="list-style-type: none"> • update the participant statement as part of pre-planning only • record more participant goals than the System allows. <p>To update the participant statement as part of an administrative change task you will refer to SOP – Administrative Change Task.</p>	APPROVED	2021-02-23
2.0	s22(1)(a)(ii) - irrelevant ma	<p>Class 1 Approved</p> <p>Update as part of the Your privacy information and gender project - to support a respectful and dignified experience for people from diverse backgrounds.</p> <p>Updates include:</p> <ul style="list-style-type: none"> • Section 3.1 - guidance about identity and including peoples preferred name and pronouns in the participant statement. • Link to new Fact sheet - Updating your name, pronouns and information about your gender. 	APPROVED	2022-11-18



Complete Update the Family Questionnaire task

The content of this document is **OFFICIAL**. The Standard Operating Procedure (SOP) will help you to complete the task **Update the Family Questionnaire** in the NDIS Business System (System). This Outcomes Questionnaire captures information about a family member/carer of the participant.

This Outcomes Questionnaire:

- captures the voice of the family and caregiver
- helps the Agency to understand the experience and outcomes of families and caregivers in the participant's life
- helps the Agency to understand the impact the Scheme is having for the participant and their family and caregiver.

1. Recent updates

Date	What's changed
January 2021	New SOP format to align with Operational Guidelines refresh. SOPs include process information only. Use Operational Guidelines to help you make decisions and refer to Related procedures or resources .

2. Checklist

Topic	Checklist
Pre-requisites	<ul style="list-style-type: none"> <input type="checkbox"/> The participant can identify a suitable family member and caregiver to do the survey. See 3.1 Identify who completes the Family Outcomes Questionnaire <p>You have:</p> <ul style="list-style-type: none"> <input type="checkbox"/> read and understood the Our Guideline – Creating Your Plan. <input type="checkbox"/> not completed the Risk Assessment task. <ul style="list-style-type: none"> ○ If you have completed the Risk Assessment task you will need to review and resubmit the Risk Assessment task after you have completed the Outcomes Questionnaires <input type="checkbox"/> started the planning conversation

Topic	Checklist
	<p>Note: You should complete the Outcome Questionnaires before the Guided Planning Questions. Completing the Outcomes Questionnaires will pre-populate answers to some Guided Planning Questions.</p>
Actions	<ul style="list-style-type: none"> <input type="checkbox"/> 3.1 Identify who completes the Family Outcomes Questionnaire <input type="checkbox"/> 3.2 Supporting the family member/caregiver to answer questions <input type="checkbox"/> 3.3 Update the Family Outcomes Questionnaire <input type="checkbox"/> 3.4 Next steps

3. Procedure

3.1 Identify who completes the Family Outcomes Questionnaire

The table below is a guide to help you identify an appropriate family member/caregiver to complete the Family Outcomes Questionnaire.

3.1.1 Guide to identify an appropriate person to complete the questionnaire

Version	Guide to identify an appropriate family member/caregiver
0 to 14 years of age	In most cases, the person who completed the Participant Outcomes Questionnaire can complete the Family Outcomes Questionnaire. They will likely be the parent or primary caregiver of the child participant.
15 to 24 years of age and 25 years of age and over	<p>Participants in these age groups, or their representative, will likely need to choose a family member/caregiver to complete the Family Outcomes Questionnaire.</p> <p>This person should complete the Family Outcomes Questionnaire in the meeting if they are present at the time the participant chooses them.</p> <p>If they are not, you should contact them to complete the Family Outcomes Questionnaire at another time.</p>

Important: Participants are more likely to be safe when they are actively involved with their family and community.

If there is no suitable family member/caregiver in a participant's life you **should not complete** the Update the Family Questionnaire task.

You should work with the participant to identify how they can build their capacity to connect with supports and services, including informal and mainstream supports.



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Follow the [Standard Operating Procedure – Complete the Risk Assessment](#) to explore appropriate safeguards with the participant. Refer to the [Practice Guide - Safeguarding the participant's interests](#) for more information.

3.2 Supporting the family member/caregiver to answer questions

You will support the family member/caregiver to answer all questions but respect their decision if they choose not to disclose information.

If the family member/caregiver is having difficulty answering questions, use active listening and interviewing skills to help them answer. They may need further explanation to be able to answer a question. You may need to repeat the question/response options, use common probing techniques to get a response, or clarify questions. The [Conversation Style Guide](#) has more information on these techniques.

If the family member/caregiver still cannot respond, or indicates they prefer not to disclose information such as income, then you should select **not disclosed** or leave the question blank and move to the next question.

3.3 Update the Family Questionnaire

There are four **Family Questionnaires**:

- young children (before starting school)
- children up to age 14
- young people aged 15 to 24
- adults aged 25 and over.

You do not need to select the correct questionnaire, the System will generate this for you.

1. In **Pre-planning – Staff Tasks**, select the **Update the Family Questionnaire** task.
2. The **Create – Short Form Outcomes Questionnaire** form opens. To expand or collapse a section select the **expander arrow**.

create-Family Questions for participants aged 15 to 24	
>	Introduction
>	Family member/carer information
>	Families know their rights and advocate effectively for their family member with disability
>	Families have the support they need to care
>	Families are able to gain access to desired services, programs, and activities in their community
>	Families help their young person become independent
>	Families enjoy health and wellbeing

3. Use the **script** from the **Introduction** to help you explain the outcomes questionnaire. Use other words if it makes it easier for the participant to understand.

Introduction

Thank you for participating in our survey. The purpose of these questions is to find out how NDIS participants and their families and carers are going in different areas of their lives. The questions are an important part of pre-planning, and will help us to develop a plan that provides the right supports. Because we ask the questions again at plan review, we will also be able to see what progress has been made, and whether any adjustments to plans are needed. Information from the questions will also be important for tracking the progress of the NDIS, and will help to improve the Scheme.

4. **Select (or type)** the response to each question in order. Try to answer as many questions with the participant as you can. You can leave any questions that don't suit the participant blank.

You don't need to ask every question directly. For example, if the participant has already given you the information, you don't need to ask the question. Select the most appropriate response and move to the next question.

Families know their rights and advocate effectively for their child with disability

Please enter the participant's NDIS ID number:

What is your relationship to the participant?:

Please specify:

Are you currently working in a paid job?: NO

What is your annual income, before tax and other deductions? Include all sources (e.g. wages, investments and Government pensions and benefits):

5. You can select **Save** at any time and complete the form later. When the form is complete, select **Submit**.

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6. When you submit the form a confirmation message appears. Select **Close**.

3.4 Next steps

1. Complete the **Update the Guided Planning Questions** task using:
 - Standard Operating Procedure – Complete the Guided Planning Questions.

Important: If you had completed the Risk Assessment task prior to the Outcomes Questionnaires you will need to review and resubmit the Risk Assessment task using guidance in [Standard Operating Procedure – Complete the Risk Assessment](#).

4. Related procedures or resources

- [Our Guideline – Creating Your Plan](#)
- [Standard Operating Procedure – Participant Outcomes Questionnaire](#)
- [Standard Operating Procedure – Complete the Guided Planning Questions](#)
- [Standard Operating Procedure – Complete the Risk Assessment](#)
- [Conversation Style Guide](#)

5. Feedback

If you have any feedback about this standard operating procedure, please complete our [Feedback Form](#).

6. Version control

Version	Amended by	Brief Description of Change	Status	Date
1.0	<small>s22(1)(a)(ii) - irrelevant ma</small>	Class 2 Approved New Standard Operating Procedure with guidance on how to complete the Update the Family Questionnaire task only. For information on completing the Update the Outcomes Questionnaire task use Standard Operating Procedure – Outcomes Questionnaire – Participant.	APPROVED	2021-01-28



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The contents of this document are **OFFICIAL**.

Complete the Short Form Outcomes Framework (SFOF)

This article provides guidance for a **planner delegate, internal review delegate, participant support officer, local area coordinator, or early childhood partner** to:

- understand the SFOF
- create a new SFOF
- complete Events
- complete the Participant Survey
- complete the Family Survey
- add or link Documents
- review Case Activity.

Recent updates

August 2023

- Updated guidance in line with PACE
- Minor language updates
- Included an introduction on what the SFOF involves and its purpose.

Before you start

You have:

- read and understood the [Conversation style guide](#).

Understand the SFOF

As an Agency, we are committed to listening to participants, their families and carers. One way we do this is through the Short Form Outcomes Framework (SFOF) questionnaire. This allows you discuss different areas of the participant's life including daily living, social and community participation and relationships.

We ask participants to complete a SFOF:

- when they are new to the Scheme



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- as part of their transition from SAP CRM to PACE
- at agreed regular times, usually every 12 months.

The SFOF helps us better understand what's working well and not so well for the participant and the Scheme. It's made up of multiple choice questions and statements.

Allow enough time for the participant or their family member to answer. Offer to repeat or explain the questions if needed. Make sure you understand and record answers that best reflect the responses from the participant or their family member.

Create a new SFOF

To create a SFOF case:

1. From the **Person Account**, select **Cases**.
2. Select **New**.
3. Select **SFOF**.
4. Select **Next**.
5. Select the default setting of **New** at **Status**.
6. Select the **Type** from the dropdown options.

Note: You can create and complete a SFOF case during a check-in case.

7. Select **Save**.
8. From the **Person Account**, select **Cases**.
9. Select the **SFOF** case from the **Case Record Type**.

Complete Events

From **Events**:

1. Select **New Task**.
2. Select a **New Task** from the dropdown options.

Note: Complete all mandatory fields marked with an asterisk with each **New Task** created.

Complete the Participant Survey

From **Participant Survey**:

1. Review the prefilled **initiation** details.
2. Select **Proceed**.



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3. Complete all **Participant Information** details. Select **Next**.
4. Complete all **Choice and Control** details. Select **Next**.
5. Complete all **Daily living activities**. Select **Next**.
6. Complete all **Relationships** details. Select **Next**.
7. Complete all **Home** details. Select **Next**.
8. Complete all **Health and wellbeing** details. Select **Next**.
9. Complete all **Lifelong learning** details. Select **Next**.
10. Complete all **Work** details. Select **Next**.
11. Complete all **Social, community and civic participation** details. Select **Next**.

At the **Conclusion** screen:

1. Select the relevant option at **Are you a participant in the NDIS or are you taking this questionnaire on someone else's behalf?**
2. At **Any Comments?**, provide any further information you discussed with the participant or their authorised representative.
3. Select **Next**.
4. At the **Submit** screen, confirm you are ready to submit now.
5. Select **Submit**.

Note: You must complete a participant survey before you start a family survey.

Complete the Family Survey

From **Family Survey**:

1. Review the prefilled **initiation** details.
2. Select **Yes** or **No** at **Is the family member or carer available to complete the family survey?** Select **Proceed**.
3. Complete all **Family member or carer information** details. Select **Next**.
4. Complete all **Families know their rights and advocate effectively for their family member** details. Select **Next**.
5. Complete all **Families have the support they need to care** details. Select **Next**.
6. Complete all **Families are able to gain access to desired services, programs, and activities in their community** details. Select **Next**.
7. Complete all **Families help their young person become independent** details. Select **Next**.



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8. Complete all **Families enjoy health and wellbeing** details. Select **Next**.

At the **Conclusion** screen:

1. In **Any Comments?**, provide any further information you discussed with the participant or their authorised representative.
2. Select **Next**.
3. At the **Submit** screen, confirm you are ready to submit now.
4. Select **Submit**.

Add or link Documents

At **Documents**:

1. Review documents linked to this case.
2. Select **Add Document** tab.

At the **Document Details** screen:

1. Select **Document Category** from the dropdown options.
2. Select **Document Subcategory** from the dropdown options.
3. Select **Yes** or **No** at **Does the document contain any Personal identifiable information (PII)?**
4. Select **Next**.
5. Select **Upload Files** to upload documents.
6. Select **Save** once you have uploaded all files.
7. Select **Close**.

To **Link Documents**:

1. Use **Search** function to find documents.
2. Select **Finish** once all documents are linked to the case.

Review Case Activity

From **Case Activity**:

1. Review or create **New Tasks** to **Open Activities**.
2. Review **Activity History**.
3. Review **Emails**.
4. Review **Related Cases**.



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5. Review **Case History**.
6. Select **Closed Status** once you've completed all details in the SFOF case.
7. From the **Status** dropdown select **Completed**. Select **Save**.

Article topics and case names – internal use only

Case names

You can use this guidance for the:

- Check-in
- SFOF (Short form outcome form)

Version control

Version	Amended by	Brief Description of Change	Status	Date
2.0	<small>s22(1)(a)(i) - irrelevant in</small>	Class 1 approval. Updated guidance in line with PACE. Minor language updates. Included an introduction on what the SFOF involves and its purpose.	APPROVED	2023-08-09



Complete the Update the Outcomes Questionnaire task

The content of this document is **OFFICIAL**. The Standard Operating Procedure (SOP) will help you to complete the Update the Outcomes Questionnaire task in the NDIS Business System (System). This Outcomes Questionnaire is about the participant.

You must complete this task for all participants so that future service bookings can be created against the participant's plan.

This Outcomes Questionnaire is used to:

- see how the participant is progressing across eight life areas related to the budgets in their plan
- monitor if the NDIS is meeting its objectives under the NDIS Act 2013
- better understand links between outcomes and key factors, such as supports received, participant characteristics, and other risk factors
- find improvements and areas where further capacity building may be needed
- help with benchmarking, to see how NDIS participants compare to Australians without disability, and to other Organisation for Economic Cooperation and Development (OECD) countries.

1. Recent updates

Date	What's changed
October 2020	New SOP format to align with Operational Guidelines refresh. SOPs include process information only. Use Operational Guidelines to help you make decisions and refer to Related procedures or resources .

2. Checklist

Topic	Checklist
Pre-requisites	<p>You have:</p> <ul style="list-style-type: none"> <input type="checkbox"/> read and understood Our Guideline – Creating Your Plan <input type="checkbox"/> not completed the Risk Assessment task. <ul style="list-style-type: none"> ○ If you have completed the Risk Assessment task you will need to review and resubmit the Risk Assessment task after you have completed the Outcomes Questionnaires <input type="checkbox"/> started the planning conversation. <p>Note: You should complete the Outcome questionnaires before the Guided Planning Questions. Completing the Outcomes questionnaires will pre-populate answers to some Guided Planning Questions.</p>
Actions	<ul style="list-style-type: none"> <input type="checkbox"/> 3.1 Supporting the participant to answer questions <input type="checkbox"/> 3.2 Update the Outcomes Questionnaire <input type="checkbox"/> 3.3 Next steps

3. Procedure

3.1 Supporting the participant to answer questions

You will support the participant to answer all questions and respect their decision if they choose not to disclose information.

If the participant is having difficulty answering questions, use active listening and interviewing skills to help them answer. They may need further explanation to be able to answer a question. You may need to repeat the question/response options, use common probing techniques to get a response, or clarify questions. The [Conversation Style Guide](#) has more information on these techniques.

If the participant still cannot respond, or indicates they prefer not to disclose information such as income, then you should select **not disclosed** or leave the question blank and move to the next question.

3.2 Update the Outcomes Questionnaire

There are four **Outcomes Questionnaires** for the participant that are based on the participant's age:

- young children (before starting school)
- children who have commenced school up to age 14
- young people aged 15 to 24

- adults aged 25 and over.

You do not need to select the correct questionnaire, the System will generate this for you.

1. In **Pre-planning – Staff Tasks**, select the **Update the Outcomes Questionnaire** task.
2. The **Create – Short Form Outcomes Questionnaire** form opens. To expand or collapse a section select the **expander arrow**.

<	create-Short Form Outcomes Questionnaire 25 and over
>	Introduction
>	Participant Information
>	Domain 1: Choice and Control
>	Domain 2: Daily living activities
>	Domain 3: Relationships
>	Domain 4 : Home
>	Domain 5 : Health and wellbeing

3. Use the **script** from the **Introduction** to help you explain the outcomes questionnaire to the participant. Use other words if it makes it easier for the participant to understand.

Introduction

Thank you for participating in our survey. The purpose of these questions is to find out how NDIS participants and their families and carers are going in different areas of their lives. The questions are an important part of pre-planning, and will help us to develop a plan that provides the right supports. Because we ask the questions again at plan review, we will also be able to see what progress has been made, and whether any adjustments to plans are needed. Information from the questions will also be important for tracking the progress of the NDIS, and will help to improve the Scheme.

4. **Select (or type)** the response to each question in order. Try to answer as many questions with the participant as you can. You can leave any questions that don't suit the participant blank.

You don't need to ask every question directly. For example, if the participant has already given you the information you don't need to ask the question, select the most appropriate response and move to the next question.

Participant Information

Please enter you NDIS ID number:

What level of school have you completed?:

What is the highest level of post-school qualification you have completed?:

"Other, please specify":

Who do you currently live with?:

"Other, please specify":

What are your current housing arrangements?:

5. You can select **Save** at any time, and complete the form later. When the form is complete, select **Submit**.

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6. When you submit the form a confirmation message appears. Select **Close**.

3.3 Next Steps

1. If the System has generated the Family Outcomes Questionnaire, complete this task using [Standard Operating Procedure – Outcomes Questionnaire – Family](#).
2. Complete the **Update the Guided Planning Questions** task using:
 - [Standard Operating Procedure – Complete the Guided Planning Questions](#).

Important: If you had completed the Risk Assessment task prior to the Outcomes Questionnaires you will need to review and resubmit the Risk Assessment task using guidance in [Standard Operating Procedure – Complete the Risk Assessment task](#).

4. Related procedures or resources

- [Our Guideline – Creating Your Plan](#)
- [Standard Operating Procedure – Outcomes Questionnaire – Family](#)
- [Standard Operating Procedure – Complete the Guided Planning Questions](#)
- [Standard Operating Procedure – Complete the Risk Assessment task](#)
- [Conversation Style Guide](#)

5. Feedback

If you have any feedback about this standard operating procedure, please complete our [Feedback Form](#).

6. Version control

Version	Amended by	Brief Description of Change	Status	Date
1.0	<small>s22(1)(a)(ii) - irrelevant ma</small>	<p>Class 2 Approved</p> <p>New Standard Operating Procedure with guidance on how to complete the Update the Outcomes Questionnaire task only. For information on completing the Update the Family Questionnaire task use Standard Operating Procedure – Outcomes Questionnaire – Family.</p>	APPROVED	2021-01-28