



**NDIS PLAN SAMPLE  
THE BASICS EXPLAINED**



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**Occupational Therapist**  
**Intake & Allocations Coordinator**

## NDIS PLAN SAMPLE

The first page of the plan includes your child's:

- Name
- NDIS number
- Contact details for the NDIS
- NDIS plan start date
- NDIS plan review date
- Part 1: About me

This is what the first page of your child's NDIS plan might look like:

## YOUR NAME – NDIS plan

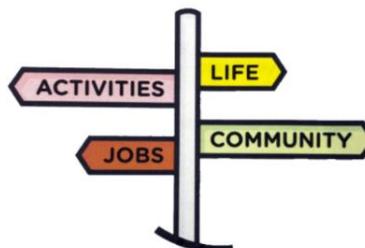
**NDIS Number:** 012345678

**My NDIS contact:** John Smith  
National Disability Insurance Agency  
Phone: 1800242696  
Email: [john.smith@ndis.gov.au](mailto:john.smith@ndis.gov.au)

**NDIS plan start date:** 2 January 2020

**NDIS plan review due date:** 1 January 2021

A National Disability Insurance Agency (NDIA) representative will contact me about my plan review before my plan review due date.



PERSONAL INFORMATION - CONFIDENTIAL

Name:  
NDIS number:  
Plan Approved:

Page 1 of 11

## PART 1: About Me

This section includes a summary about the child, their daily life and the people who support them.

### My profile

#### Information about me

This is personal information about me and I can choose to share this information with my service providers.

#### Date of birth

1 February 2017

#### Preferred contact details – telephone

Home phone: 9999 9999

Mobile: 0411 111 111

#### About me

*Here is where the NDIS planner will write a bit about your child, their typical everyday life. Below is an example of the type of information that might be included:*

Monica lives at home with her parents Rachel and Ross, and her siblings Chandler and Phoebe. Monica is the youngest.

Monica and her family live in Mornington, Victoria, in a two storey house with a small backyard, where the family dog Joey spends most of his time.

Monica attends kinder 3 days per week and her parents would like her to start school in the next 2 years.

Monica's parents are her biggest supports and help her with all aspects of daily life. Monica sees her grandparents most weekends, she loves going to the park and playing with Joey.

#### My Family and friends

- Monica's parents, siblings and grandparents are her informal supports.

#### My Services and community involvement

- Monica attends kinder 3 days per week in her local community
- Monica has regular check ups with her Paediatrician

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Page 1 of 11

## PART 2: My Goals

**This part of the plan lists the goals that you want to work towards during your child's NDIS plan.**

### My goals

This is what I want to achieve

#### Short-term goal

During this plan Rachel and Ross would like Monica to improve her fine and gross motor skills to participate in age appropriate activities at home and kinder.

How will I achieve this goal	How I will be supported
<ul style="list-style-type: none"> <li>- Funding for therapies to support skill acquisition and development such as physiotherapy and occupational therapy</li> </ul>	<ul style="list-style-type: none"> <li>- Therapists and/or allied health assistants will support me to improve my skills and support my parents to support me</li> </ul>

#### Medium or long-term goal

Rachel and Ross would like Monica to improve her communication skills, increase her vocabulary and ability to interact with unfamiliar listeners.

How will I achieve this goal	How I will be supported
<ul style="list-style-type: none"> <li>- Funding for therapies to support development of speech and language and social skills</li> </ul>	<ul style="list-style-type: none"> <li>- Therapists and/or allied health assistants will support me to improve my skills and support my parents to support me</li> </ul>

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Page 1 of 11

## PART 3: My Supports

This part of the plan details the supports that will help your child work towards achieving their goals through the NDIS.

### Funded supports information

My funded supports can help me achieve my goals

#### Managing my NDIS funding

There are 3 different ways my plan funding can be managed:

- **Self-managed:** I will claim funding from my NDIS plan to pay providers myself or my plan nominee or child representative may do this on my behalf. Providers will invoice me directly for supports I have agreed they will provide.
- **Plan-managed:** My plan management provider will make claims and pay providers on my behalf for supports I have agreed they will provide.
- **NDIA-managed:** Providers will claim payment directly from my NDIS plan based on active service bookings. Where supports are NDIS-managed, I can only use an NDIS registered provider.

My funding may be managed in one or more of these ways and is listed with my funding on the following pages.

#### Stated Supports

Where a support is listed as 'stated' in my plan, I must purchase this support as described in my plan. I cannot swap 'stated' supports for any other supports.

#### In-Kind Supports

Where a support is listed as 'in-kind' in my plan, I must continue with my existing service provider as they have been pre-paid to deliver this service. However, if I have a concern about using my in-kind provider I can raise my concerns with my NDIS contact.

#### Quote Required

Where a support is listed as 'quote required' additional information such as quotes and/or specialist reports will be required. Once the quote is approved, the funding will be made available in my plan.

#### SELF - MANAGED:

You will be responsible for paying the invoices for supports for your child with their NDIS funding. You can access any provider you choose.

#### PLAN - MANAGED:

You will be responsible for connecting with a plan manager and for letting your providers know who this is. The plan manager will pay invoices for your child's supports on your behalf. You can access any provider you choose.

#### NDIA - MANAGED:

Your providers will make service bookings in the portal to an agreed amount from your child's funding and then claim their payments from this as services are delivered. You can only access NDIS registered providers.

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Page 1 of 11

## PART 3: Types of Supports

### Core Supports

Core supports help with your child's everyday activities, current disability related needs and to work towards their goals.

This budget is the most flexible.

It may include things like Consumables (e.g. nappies), Assistive Technology or hours for support workers.

Two questions to come back to when thinking about how this budget can be used are:

1. Is it reasonable and necessary for my child?
2. Does it support their goal/s on this NDIS plan?

### Capacity Building Supports

Capacity Building Supports are intended to build your child's independence and reduce their need for the same level of support into the future.

Your child's progress and outcomes from these supports will be shared at each plan review. An example of this is your Biala keyworker providing a progress report summarising work on goals from your child's NDIS plan.

This budget can only be used to purchase approved supports that fall within the Capacity Building category.

An example of a Capacity Building category:

- **Improved Daily Living (CB Daily Activity)**
- Can be used for individual or group therapies
  - Therapists and therapy assistants

When we complete a service agreement with you at Biala, we will work out how many hours of service are included in your child's budget with you and confirm how you would like to receive services to best meet your child's needs.