



Planning and assessment to inform support

What does this fact sheet explain?

This fact sheet provides an overview of the individualised planning and assessment process for National Disability Insurance Scheme (NDIS) participants.

The planning and assessment conversation

Once it has been determined that you are able to access the scheme, we book an appointment for a planning and assessment conversation with you.

The planning and assessment conversation helps us to understand what you can do and what supports you might need.

To make things easier and quicker for you, we review existing information that is already available to us, including your:

- Access Request Form
- Evidence of Disability Form (where required)
- My Access Checker.

We ask you to bring your Participant Statement to the appointment. We focus on understanding your circumstances, especially what you have told us about your:

- daily life
- current living arrangements
- current relationships and supports

from other people

- goals for your plan and how you want to achieve them
- your current supports.

If you have not already completed your participant statement, we can discuss the things outlined above as part of our planning and assessment conversation and help you develop your statement.

Understanding your support needs

Your NDIA planner will use the support needs assessment approved for use in the Scheme to guide the planning and assessment conversation.

This conversation will be informal and tailored to you. Discussion will range from general things, such as how you usually manage daily activities, to more specific questions about how much support you think you need for certain tasks.

The planning and assessment conversation is flexible so together we can focus on what is relevant to you and skip areas that are not. It will focus on ways to use your strengths and existing mainstream or community supports to pursue your goals.

The aim of this conversation is to build on the information you have already provided to us and to work together to ensure that we can help target your current supports towards achieving your goals.

At the end of the conversation we will also talk about your confidence in self-managing you plan and whether you need a local area coordinator to help you piece the plan together.

The time required for the planning and assessment conversation varies depending on each participant's individual needs. Some conversations may happen over more than one session, with time in between to research and consider support options.

Referring you for specialist assessments if required

In some cases, we may require a specialist assessment to make sure your plan includes supports that are reasonable and necessary to meet your goals and needs.

Specialist assessment may involve a medical, psychological or other examination conducted by an appropriately qualified person. We will discuss with you the scope of the assessment, how it will be done and reported.

To decide whether additional specialist assessment is required, we work with you to consider:

- what is most appropriate and relevant for you, and how it might help in preparing or approving your statement of supports
- the likely benefits and practical aspects of arranging the specialist assessment.

Another fact sheet with more information about developing your participant statement is included in this planning kit.

More information

If you need help understanding this fact sheet or need more information:

- email enquiries@ndis.gov.au
 - call 1800 800 110
 - visit [the NDIS website](http://the-NDIS-website-at-ndis.gov.au) at ndis.gov.au
 - if you are a TTY user — phone 1800 555 677 then ask for 1800 800 110
 - if you are a Speak and Listen (speech-to-speech relay) user — phone 1800 555 727 then ask for 1800 800 110
- if you are an internet relay user — visit the [National Relay Service website](#) and ask for 1800 800 110.