

# Planning My NDIS Journey



Brightwater

My name:

Date:

Email:

My Brightwater contact:

Phone:

# Let's get prepared for your NDIS planning meeting

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You're on your way to getting started with the National Disability Insurance Scheme (NDIS). To help you get set for your meeting, we've created this booklet so you can start thinking about you, your life and how you want to live it. Whether that's today, tomorrow or five years in the future, this resource should help you reflect – not just on what you need, but also on what you want. So write down what's on your mind, because after all – your plan needs to work for YOU.

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# My Personal Details

Full Name:

Preferred Name:

Date of Birth:

Birth Country:

Permanent Address / Where I Live:

My Phone Number: (or the best number to reach me on)

My Email Address:

Medicare Number: (if known)

# My Health & Wellbeing

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## **My primary disability**

How does this affect my day to day life?

## **My secondary disability**

How does this affect my day to day life?

## **Things that are going well with my health**

eg: exercise when I can, pain is well managed

## **Things that could be better**

eg: diet and exercise, remembering my medication, waiting for surgery

# People Who Are Important To Me

Who are the people in your life that assist you? They might be family members, good friends, or people who work for a support organisation or community centre.

Write down their contact details here.

## Family & Friends Who Support Me

Name:

Relationship to me:

Phone number:

How they support me:

Name:

Relationship to me:

Phone number:

How they support me:

## Carers & Support Workers

Name:

Where they work:

Phone number:

How they support me:

Name:

Where they work:

Phone number:

How they support me:

**Health Care Providers** eg: GP, specialists, hospital contacts

Name:

Where they work:

Phone number:

How they support me:

Name:

Where they work:

Phone number:

How they support me:

Name:

Where they work:

Phone number:

How they support me:

Name:

Where they work:

Phone number:

How they support me:

# Making Decisions

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**I make all my own decisions**

YES

NO

**I need help to make some decisions**

Name of who helps me:

Relationship:

Contact Details:

**I have a legally appointed guardian or administrator to support me**

Name:

Organisation:

Contact Details:

# Communicating

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**I need help to communicate**

YES

NO

**How I would like people to communicate with me**

eg: allow me time to process and answer your question; I need an interpreter; I use an iPad to communicate; I do not like people looking at me directly; I prefer to be called something other than my first name



# About Me

If someone wanted to get to know you, what important things should they learn about who you are?  
Write those things down here.

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## What I like

What things do you enjoy doing?

## What I'm good at

What things do you do well by yourself?

## What I would like to do more of

What things do you like but aren't doing at the moment?

## My beliefs and culture

What are you passionate about? eg: your religious beliefs  
What's important to you? eg: your background and where you come from

# My Experiences

With words or drawings, describe how your experiences have affected your life and how you've been coping with your disability.

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# My Daily Routine

Think about all the activities you do in a normal week. That might include work, learning, socialising, community work, or health and wellbeing commitments. Write them down here, including the time and place.

	<b>Activities</b> Things that I do regularly on this day, eg: work from 9 to 5, play basketball at 4pm	<b>Who supports me</b> Who helps me do these things?	<b>It's going well!</b>	<b>It's not going well</b>
<b>Monday</b>			<input type="checkbox"/>	<input type="checkbox"/>
AM				
PM				
<b>Tuesday</b>			<input type="checkbox"/>	<input type="checkbox"/>
AM				
PM				
<b>Wednesday</b>			<input type="checkbox"/>	<input type="checkbox"/>
AM				
PM				

**Activities**

Things that I do regularly on this day, eg: work from 9 to 5, play basketball at 4pm

**Who supports me**

Who helps me do these things?

**It's going well!**

**It's not going well**

**Thursday**

AM

PM

**Friday**

AM

PM

**Saturday**

AM

PM

**Sunday**

AM

PM

## Other Activities

### Other things I do from time to time

Activities that aren't part of my daily routine, eg: visit my grandparents in the country

### Things I used to do that I really enjoyed

### Why I don't do these things more often

What barriers are keeping you from doing the things you like?

# My Home

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**The type of home I currently live in** eg: house, sharehouse, apartment, unit, supported accommodation

**The people I usually live with**

**Does my home need to be modified so I can be more independent?** eg: rails in my shower so I don't need assistance, lower my kitchen benches so I can prepare food more easily

**Do I need to find somewhere else to live?** eg: I want to move out of home, I have no permanent home, I need more support

# Managing My Daily Routine

Think about how you currently support yourself and how others support you.

Describe how you go about your day-to-day life, and what any extra support looks like.

Self-Care	My Answer	Who supports me	How they support me	How often they support me	How I want to be supported
How I prepare and choose meals					
How I keep my room or home tidy					
How I shower & use the bathroom					



In your Planning meeting, it is important to explain and talk about what your 'worst day' looks like. This will help the NDIS Planner to better understand your needs and be able to provide you with the right level of funding so you are well supported during these times.

**Getting around**

**My Answer**

**Who supports me**

**How they support me**

**How often they support me**

**How I want to be supported**

**How I get to activities**

**How I get to therapy or health care appointments**

**Money Management**

**My Answer**

**Who supports me**

**How they support me**

**How often they support me**

**How I want to be supported**

**How I budget my money**

**How I pay bills and expenses**



Work & Learning	My Answer	Who supports me	How they support me	How often they support me	How I want to be supported
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**Do I need help to find a job?**

**How I manage at work or my place of study**  
 eg: understanding and remembering new information

Social Life	My Answer	Who supports me	How they support me	How often they support me	How I want to be supported
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**What I do for fun**

**How I make friends and meet people**

Behaviour	My Answer	Who supports me	How they support me	How often they support me	How I want to be supported
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How I respond to things that upset or frustrate me

How I deal with and manage my emotions

If I need to take a break

My Answer
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Who supports me
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How they support me
---------------------

How often they support me
---------------------------

How I want to be supported
----------------------------

Where would I like to go?

What temporary supports would I need?

**Other**

**My Answer**

**Who supports me**

**How they support me**

**How often they support me**

**How I want to be supported**

Is there anything else I need support with?

# Equipment & Technology I Have Now

Describe the aids, equipment, assistive technology or modification support you're currently using.

## What it is

eg: tablet, mobility equipment

## What it's for

eg: as a speech aid, as a walking aid

## When I use it

eg: when I have a lot to say,  
when I have far to travel

## How often I use it

eg: every day

## Do I own it or will I need to replace it under NDIS?

				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>

# Equipment That Would Improve My Quality Of Life

Think about any aids, equipment, assistive technology or modification support you need but don't have yet.

What	How this would improve my independence	When I would use it	How often

# My Goals

What things about your day-to-day life could be better? What do you wish you could do or try? And if you could, what would you change? Maybe it's to do with your daily routine, social life, relationships or your career. Whatever it is, write down what you'd like to achieve in the next 12 months and how you can see yourself getting there.

## My Goals For The Next Year

**Goal #1** Is this a short-term goal?  Medium?  Long-term goal?

**Why is this so important to me?**

eg: I want to make new friends that have the same interests as me

**What skills do I already have to achieve this goal?**

eg: using the bus to get there

**What extra skills do I need to learn to achieve this goal?**

eg: organising another way to get home

**What else is preventing me from reaching this goal at the moment?**

eg: my support worker from Brightwater

**Goal #2** Is this a short-term goal?  Medium?  Long-term goal?

**Why is this so important to me?**

**What skills do I already have to achieve this goal?**

**What extra skills do I need to learn to achieve this goal?**

**What else is preventing me from reaching this goal at the moment?**

# My Goals For The Future

## Goal #1

**Why is this so important to me?**

**What skills do I have that could help me get there?**

**What skills do I need to help me get there?**

**What support do I have to help me get there?**

**What support do I need to help me get there?**

## Goal #2

**Why is this so important to me?**

**What skills do I have that could help me get there?**

**What skills do I need to help me get there?**

**What support do I have to help me get there?**

**What support do I need to help me get there?**

# My NDIS Plan

Before you get the ball rolling with NDIS, it's important to get your head around how it all works. That way, you can confidently make decisions on how you'd like to spend your funding on and how you'll manage it. **Talk to the NDIS team at Brightwater** – we'll explain all the ins and outs before you make any decisions. **You can call 1300 223 968 and ask to be put straight through to our NDIS team or email [disabilityservices@brightwatergroup.com](mailto:disabilityservices@brightwatergroup.com).**

## How my NDIS funding will be managed

You have the option to self-manage your NDIS funding, which means you can choose from a wider range of service providers and you will be responsible for paying them directly (eg: your support workers). For your first Plan, it may be a good idea to try managing one budget to start with. If self-management is a bit overwhelming to start with, the NDIA will manage your funds and pay your service providers directly. You'll feel a lot more confident to explore full self-management once you have completed your first year with NDIS.

	YES	NO
<b>I would like the NDIA to manage my funds</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>I will manage my own funds, with support from my carer if I need it</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>I will get a professional to manage my funds</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>I will request automated payments for transport funding</b> You can arrange for transport funding to be automatically deposited into your personal account	<input type="checkbox"/>	<input type="checkbox"/>
<b>I will combine a few of these options</b>	<input type="checkbox"/>	<input type="checkbox"/>

## Making the most of my NDIS funding

Support Coordination and Specialist Support Coordination services can help you explore how to best use your NDIS funding, helping you maximise the benefits of your plan. If you have complex needs, limited informal supports or are making significant changes in your life, you can ask your NDIS Planner to consider providing Support Coordination as part of your Plan. Brightwater offers these services.

	YES	NO
<b>I'd like to discuss Support Coordination</b> Help with organising activities, services, social connections and other supports	<input type="checkbox"/>	<input type="checkbox"/>
<b>I'd like to discuss Specialist Support Coordination</b> Specialist support for more complex needs	<input type="checkbox"/>	<input type="checkbox"/>



# My Document Checklist

When the NDIS rolls out in your area, someone will get in touch with you to arrange your planning meeting. If they haven't, you can contact the NDIA on 1800 800 110.

Our Brightwater NDIS team is here to help, so you can always give us a call on 1300 223 968 and we'll talk you through it.

When you're ready to get started, use this page to keep track of the forms, ID and documents you'll need for your meeting.

Tick each box when you're all sorted, and don't forget to make a list of questions to ask and things you might need to remember.

- This booklet, fully completed
- My list of questions and notes
- A copy of my Pension Card
- A letter from my Doctor
- A letter from my employer (if applicable)

These items might not be required, but it's a good idea to bring them if you have them.

- Statement from my carer
- Other proof of disability
- Reports from my school
- Reports or a letter from a psychologist
- Other medical reports

## Things To Keep In Mind

**The quality of your first NDIS plan is very important.** Your plan will be approved for 12 months, and it's unlikely to change during this time unless there are exceptional circumstances.

**Make sure you ask for a face-to-face meeting.** While it is an option to have your meeting over the phone, you'll be able to communicate your needs better in person.

**You're welcome to bring a support person to your planning meeting,** such as a family member, friend or carer. Whoever they are, we recommend that they know you well and have a good understanding of the NDIS system. You can even contact Brightwater and ask the Capacity Building team to attend with you, or suggest the right advocacy group. This is a free service.

# My Questions & Notes

Use this page to make a list of the questions you'd like to ask your NDIS planner, as well as anything else worth taking note of.

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**Question**

**Answer**

## Notes





**Brightwater**

Brightwater Care Group  
Brightwater House, Level 3  
355 Scarborough Beach Road  
Osborne Park WA 6017

**For more information, contact Brightwater  
and ask to speak to the NDIS team.**

 1300 223 968

 [brightwatergroup.com](http://brightwatergroup.com)

 [disabilityservices@brightwatergroup.com](mailto:disabilityservices@brightwatergroup.com)