



# NDIS Planning Workbook



Achievement



Checklist



Contact



Goals



Journey



Q & A



Resources



Support



Schedule



Employment

For more information contact us:

Call: 08 8130 1800 | Visit: [mobogroup.com.au](http://mobogroup.com.au)

Email: [enquiries@mobogroup.com.au](mailto:enquiries@mobogroup.com.au)

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# Welcome to NDIS at Mobo Group

The NDIS is a new way of providing support and funding to Australians with a disability. At Mobo Group, we are a registered provider of NDIS services.

Mobo Group is here to support and guide you throughout every step of your NDIS journey. We will go above and beyond to make sure that you feel confident about the NDIS and help to create the right plan for you.

This planning template has been designed to assist you through the process of developing your NDIS plan. It is designed to help you prepare for your planning meeting, which helps us understand your personal situation and what you would like to achieve. This template will help you identify your current supports, needs and goals. It also gives the National Disability Insurance Scheme (NDIA) the information needed to prepare your unique NDIS plan.

## How to Complete this Template

We encourage you to use this template to help kick start the conversation ahead of your planning meeting. If you are able to complete it, please bring it to your planning meeting. If you need any help filling out this template, the Mobo Group NDIS Support Team can assist you.

There are no right or wrong answers. This template is just a starting point for your journey with the NDIS. If you don't finish it all in one go, don't worry. You can go back and change answers or leave some questions unanswered to discuss in your planning meeting. When completing this template, think about your current support services and what else you might require to be the best you can be in the future.

Once you're ready to start your NDIS journey, contact the Mobo Group NDIS Support Team to start your NDIS journey. You can contact them on 08 8130 1800 or via email at: [enquiries@mobogroup.com.au](mailto:enquiries@mobogroup.com.au).





# Checklist for your NDIS Planning Meeting

At Mobo Group, we provide support and guidance so that you are prepared and comfortable with the NDIS process. The following checklist will help you feel ready and confident about your NDIS planning meeting.

Remember, Mobo Group is here for you every step of the way. You can contact the Mobo Group NDIS Support Team at any time for additional support understanding or applying for the NDIS.

Have you done the following:

Task	How	I have done this
Check your eligibility to be an NDIS Participant.	Your eligibility for access to the NDIS will be determined by the National Disability Insurance Agency (NDIA). The eligibility criteria includes: <ul style="list-style-type: none"><li>• under 65 years of age</li><li>• Australian citizen or resident or permanent visa holder,</li><li>• meet the disability or early intervention requirements.</li></ul>	<input type="checkbox"/>
Contact the NDIA to start an application to become an NDIS Participant.	Call the NDIS on 1800 800 110 and ask to start the application process.	<input type="checkbox"/>
Completed the application process by filling out an NDIS Access Request Form.	Complete this process over the phone or requested to have the form sent to your home address in the post. You can complete the form and email or post it to the NDIA.	<input type="checkbox"/>
Receive approval to officially become an NDIS participant.	You will receive a letter in the post which states that you have been accepted as an NDIS Participant.	<input type="checkbox"/>
Book your a NDIS planning meeting.	You will receive a phone call from the NDIA or your Local Area Coordinator (LAC) to organise a time to book your NDIS Planning Meeting.	<input type="checkbox"/>
Completed the Mobo Group NDIS Planning Template.	Fill in the workbook below to record your weekly supports and your goals. Bring this workbook to your planning meeting.	<input type="checkbox"/>
Contact the Mobo Group NDIS Support Team.	Call Mobo Group on 08 8130 1800 to speak to the NDIS Support Team. This team will help develop your goals and discuss the supports you may receive from the NDIS. Mobo Group will provide you with a letter to take to your planning meeting.	<input type="checkbox"/>
Get together all relevant documents to bring to your planning meeting.	Gather together documents that explain your disability and the supports that you require. This includes reports from health care professionals including psychologists, physiotherapist, paediatrists and any other services you receive/require.	<input type="checkbox"/>

You're ready for your planning meeting!



## About Me

Tell us about your lifestyle, daily routine, activities, likes and passions. For example, you might like to include:

- What is important to you?
- Do you currently have a job?
- What activities you currently participate in?
- Are there any areas that need improvement or that you would like to change?
- Are there any new things you would like to try?
- What do you enjoy doing?

### About Me



# My Day-to-Day Activities

DAY	WHAT I DO	WHO HELPS ME	EQUIPMENT I USE
MONDAY			
TUESDAY			
WEDNESDAY			
THURSDAY			
FRIDAY			
SATURDAY			
SUNDAY			

## Things I Sometimes Do

Month	What I Do	How Often	What Help I Have

## My Current Living Arrangements

### Things to consider:

- Who you live with?
- What type of accommodation do you live in?
- Would you like to change anything about your living arrangements?
- Is there anything you could change to make things easier for you or to increase your independence at home?

### My Living Arrangement



# My Current Support Networks

## Important People in Your Life

- Who are the important people in your life who support you? This can include friends, family, neighbours, work mates, support workers, doctors, therapists etc.

Name	Relationship to you	Describe how they are involved in your life.

## My Current Aids

### Things to consider:

- Do you need any special equipment? This could be a wheelchair, hearing aid, speech aid or hoist.
- How often are you using this equipment in your day-to-day life? Is this equipment currently meeting your needs or does it need to be improved?
- Have you had any modifications to your home? Does your home need to be modified? These modifications could include ramps or lifts.

### **My Equipment and Home Modifications**





## My Current assistance

### Things to consider:

- Do you have any assistance to carry out your day-to-day activities? What kind of assistance?
- Do you have any formal supports? These could be through the health care system, community centres, work or education, cleaners, personal helpers etc.

### My Formal Supports

Blank area for recording formal supports.





## My Goals

Setting goals for yourself is a key part of your NDIS planning journey. Your goals could include some short-term or long-term things that you want to achieve in the future.

For each goal, you can consider:

- Is anyone helping you achieve this goal?
- Is there anything stopping you from achieving your goals?
- What would you need to do to achieve this goal? Eg. Support worker, equipment, therapy etc.
- How will achieving this goal impact your life?

You can fill in the below boxes in areas that are important to you (it may be that not all areas apply to you). Remember that there are no wrong answers.

Tip: The NDIS is all about increasing your skills and independence. Start writing a goal by using the following sentence starters:

- I would like to increase my capacity to....
- I would like to develop my skills in....
- I would like to continue....
- I would like support to....
- I would like to increase my skills in....



## My Workplace Goals

Things to consider:

- Getting a job
- Volunteering
- Changing your work hours
- Changing your role at work

### Goals About My Work

Example Goals:

- I would like to start/continue a job in supported employment.
- I would like support in preparing for a job in open employment



# My Independence Goals

## Things to consider:

- Getting around the house on your own
- Getting around with less assistance
- Would you like to be more independent? How so?

### Goals About My Independence

#### Example Goals:

- I would like to develop my skills to cook and clean in my home.
- I would like to increase my capacity to shower and take care of my hygiene.

# My Education Goals

## Things to consider:

- Attending school
- Attending university
- Enrolling in a course
- Improving your skills

### Goals About My Education

#### Example Goals:

- I would like support to complete my TAFE course.
- I would like to increase my capacity on the computer.



# My Relationships and Social Activities Goals

## Things to consider:

- Seeing your friends more
- Making new friends
- Joining a club
- Being able to attend more events

### Goals about My Relationships and Social Activities

#### Example Goals:

- I would like to increase my capacity to attend social events in the community.
- I would like support to attend a boxing club once a week.

# My Living Arrangement Goals

## Things to consider:

- Modifying your current house so you can be more independent
- Living somewhere else

### Goals About My Living Arrangement

#### Example Goals:

- I would like my home to be modified to suit my needs. Eg bathroom renovation.
- I would like support to plan a transition into supported accommodation.

# My Health and Fitness Goals

## Things to consider:

- Being more active and healthy
- Joining a gym and/or sports club

### Goals About My Health

#### Example Goals:

- I would like to improve my fitness with the support from a support worker to help me attend the gym.
- I would like to increase my capacity to cook healthy meals independently in my home.



## My Additional Goals

## Things to consider:

- Is there anything else that you could like to achieve in your life?

### Other Goals

#### Example Goals:

- I would like to start horse riding.
- I would like to learn how to swim.



# How my NDIS Funding is Managed

In your NDIS Planning Meeting, you will discuss how you would like your NDIS funding to be managed. This means that you can choose how your support providers will be paid. There are three options and you will discuss which is best for you. The options are in the table below.

How the Funding is Managed	How Does it Work?
Self Managed	This option means that yourself or your plan nominee draws the funds from the NDIS Portal and pays the support provider directly. This option requires you to keep records for 7 years.
Plan Managed	This option requires you to choose a plan management agency to pay your service providers with your NDIS funding. This option does not require you to keep records.
Agency Managed	This option means that your service provider is paid directly by the NDIA. This option does not require you to keep records.

## My questions about how funding is managed:



## Additional Comments and/or Questions



Well done! You have completed the workbook!  
Bring this workbook to your NDIS planning meeting 😊

Mobo Group is here to support you through your NDIS Journey. Please contact the Mobo Group Support Team on 08 8130 1800 or via email at [enquiries@mobogroup.com.au](mailto:enquiries@mobogroup.com.au) if we can help you further.

