



GUIDE TO NDIS PRE-PLANNING

For people aged under 65 years preparing for their first NDIS plan or plan review.

JUNE 2023

What is an NDIS pre-plan?

Pre-planning is the process of developing a detailed plan that is individualised to the NDIS participant. This pre-plan is completed and taken to the NDIS planning meeting with the NDIS planner. Pre-planning information must be documented in NDIS language using NDIS descriptions for disability related supports. It is important that the pre-plan identifies supports required to leave hospital and live safely in the community, with clear justifications as to why each support is reasonable and necessary for the participant.

Who is this for?

- **NDIS participants who are in hospital** and are at risk of admission to residential aged care (RAC) or NDIS participants who require support to be able to return home from hospital
- **NDIS participants living in the community** who are preparing for their first NDIS plan
- **NDIS participants who are preparing for their NDIS plan review meeting** while in hospital or living in the community

Using a pre-plan template

The purpose of a pre-plan template is to support NDIS participants to prepare for their NDIS planning meeting. It can be completed by a person's multidisciplinary team, support coordinator, allied health professional or other support person.

When completing pre-planning, it is essential that you refer to the most up-to-date NDIA Price Guide and Support Catalogue.

All formal supports requested and justified in a pre-planning template are required to meet the NDIS' reasonable and necessary criteria. In order for the supports to meet the criteria, they must:

- Be related to the participant's disability (not a 'health condition')
- Assist a participant to achieve their goals
- Facilitate the participant's social and economic participation
- Represent value for money, relative to the benefits achieved and cost of alternative support
- Be considered good practice and likely to be a benefit to the participant
- Be unreasonable for families, carers, networks and the community to provide
- Not be the responsibility of another government sector (e.g. health, housing, education)

A sample pre-plan template

The template linked below incorporates design elements of pre-plan templates developed by various health services across Australia. It has been tested with clinicians and providers who are supporting people with disabilities in hospital or in the community.

The pre-plan template includes key information from the NDIS Price Guide and Support Catalogue – effective May 2023.

This template has been designed to be completed from beginning to end. There are links that let you jump between different sections which will make it easier to fill in details such as 'participant goals' and 'support items'. This ensures that recommendations for supports are linked to the participant's goals and the appropriate support category.

Any support category that is not relevant or linked to goals for the participant you are working with can be deleted. E.g. if 'Support Category 3.6 - Improved health and well-being' was not relevant to a participant you can delete this table.

Instructions and prompts to help you complete this template, are in italics and are highlighted in yellow. Once you have completed each section, please delete all highlighted text, including 'The Support Item Reference list' section at the end of the template.

An example of a Support Category table in the pre-plan template:

	1.1 Support Category Name:	←	The Support Category Name is taken from the NDIS Support Catalogue. E.g. Assistance with daily life
Choose the relevant goal aligned to this support category and paste the description from the Participant goal's section.	Goal/s <i>Paste the goal/s description from the Participant Goal's section</i> <ul style="list-style-type: none">Paste here		
Outline the estimated hours recommended for each support item. The cost per hour (per item) is outlined in the NDIS Support Catalogue	Support Item Name <i>Choose (copy) one or more from this list and paste below (as per latest support catalogue)</i> <ul style="list-style-type: none">Paste here (include hours and cost per hour – where relevant)Paste here (include hours and cost per hour – where relevant)Paste here (include hours and cost per hour – where relevant)	←	Select a support item name from the linked list. Only the items listed under the relevant heading e.g. 1.1 in the linked list are able to be funded within this support category, as per the price guide.
	Clinical Justification: Type here	←	The clinical justification for the support item needs to consider the NDIS reasonable and necessary criteria and risks associated with the person not having access to the recommended supports.
There are three ways in which supports can be paid: Self-Managed, Plan-Managed or Agency-Managed Select the relevant plan management option, then delete the other two options.	How the support will be paid: <i>Choose one option and then delete the other two</i> <ul style="list-style-type: none">Self-managedPlan managedAgency managed		



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