



# Access, support needs assessment and budget setting

## The panel's vision

People with disability and families should be supported to find and use disability supports that meet their needs and increase greater social, economic and community inclusion.

Getting access to the NDIS, gathering information about your disability support needs, setting a budget and finding supports and services that work for you should be easier, with more help at each step.

The process should be fair, consistent and respectful. You should be confident that you will have support as your needs or circumstances change.

<p><b>What is the problem?</b></p>	<p><b>You told us that the current NDIS access and planning process:</b></p> <ul style="list-style-type: none"> <li>• Is complicated, unclear, unfair and focuses on a diagnosis, not on your needs.</li> <li>• Requires many professional reports that are expensive, difficult to get and are not always used to inform decisions.</li> <li>• Has become a negotiation instead of a genuine opportunity to plan. This makes planning stressful, adversarial and sometimes traumatic.</li> <li>• Leaves you feeling you must paint the worst picture of yourself to justify the support you need.</li> <li>• Does not help you to understand what you can spend your funds on or help you to find supports that will work for you.</li> <li>• Makes it hard to plan for your future.</li> </ul>
<p><b>What is the solution?</b></p>	<p><b>To make this experience simple, clear and fair, we recommend separating the current planning process into stages - access, disability support needs assessment, setting a budget and using your budget.</b></p> <p>You should have help at every stage: to gather information to make an access request, have a person-centred needs assessment, set a budget that is based on your support needs, and create a spending plan to use your budget. We recommend:</p> <ul style="list-style-type: none"> <li>• Local navigators to help you get information to make an NDIS Access Request.</li> <li>• A new Access Request Form which explains what information is needed.</li> <li>• Any extra reports requested by the NDIA should be paid for by government.</li> <li>• While your application is processed, a navigator should help you find mainstream services and new foundational supports in your community so you are not left without support while you wait.</li> <li>• If accepted into the NDIS, you should meet with a skilled needs assessor. They should gather more information about you and your circumstances. They should also do a comprehensive needs assessment. The needs assessment should take account of what kind of support you need in your daily life and should include information from you, your family (where appropriate) and any medical or clinical professionals.</li> <li>• The needs assessor should create your individual NDIS budget based on the results of the needs assessment. That means most people will meet and talk with the person who will make the funding decisions.</li> <li>• Your budget should be easy to understand. It will be flexible, with just a few limitations – such as home and living supports or assistive technology.</li> <li>• Your navigator should help you understand how to use your flexible budget. They should help you find mainstream services, foundational supports and disability specific services to meet your needs and achieve the outcomes that are important to you.</li> </ul>
<p><b>Who will this benefit?</b></p>	<p>NDIS processes should be fair and clear and easier for <b>people with disability and their families</b> to understand. You should know and understand how decisions about access and budgets are made. NDIS budgets should be set in a fair and transparent way. You should be given a flexible budget and trusted to use it in a way that helps you achieve your goals and live an inclusive life. You should have more help every step of the way. You should be confident that the NDIS will be there for you when you need it. <b>The Australian community</b> should see the NDIS is fair and helps participants to achieve their goals, participate in the community and have similar opportunities as other Australians. They should be confident that the NDIS is managed well.</p>
<p><b>What happens next?</b></p>	<p>We know you might be worried about what this will mean for you. We strongly recommend that people with disability, their families and representative organisations are closely involved in designing and testing these new processes to make sure they work well. We also recommend that they are introduced gradually so everyone has time to get ready.</p>

# Lee learns new skills to prepare for work and moving out of home

## HOW THE FUTURE NDIS PARTICIPANT EXPERIENCE COULD WORK

### Case Study:



Lee is 21 years old and lives on the outskirts of a northern NSW town. Lee has a GP report of mild to moderate intellectual disability, mild speech impairment and possible hearing loss.

Lee was accepted into the NDIS one year ago. His local high school struggled to support him well, did not meet his educational needs and he dropped out at age 15. His current NDIS plan has funding for Lee to attend an Australian Disability Enterprise (ADE) and for community participation, which he doesn't use. His plan notes state that Lee enjoys his social life at the ADE, and that his parents would like him to make friends, learn skills to help him get a job and move out of home when he is ready.

### Meeting NDIA needs assessor

Kelly is a social worker and Lee's new needs assessor. Before Lee's scheduled plan reassessment Kelly reads Lee's current NDIS plan. The plan includes his goals, the report from his GP and his family statement. Kelly notes Lee's preferred way to communicate is to text or call his mother and plan nominee Shelley. Kelly calls Shelley and explains that the purpose of their first meeting is for everyone to get to know each other, go over Lee's existing information and discuss Lee's needs and goals. Shelley puts the phone on speaker and Kelly invites Lee to bring his family if he wishes to their meeting at a location of his choice. Lee wants to meet Kelly at his family home with his parents and brother.

At their first meeting, Kelly and Lee discuss how Lee's current plan is working for him and what he might like to do in the future. Lee likes the idea of moving out of home one day like his brothers did. He hasn't thought about work outside his ADE because he really likes socialising with his friends there. Lee's parents think it would be good for Lee to start learning skills to work outside the ADE, make new friends and build his skills so he can move out of home one day. Lee agrees but isn't sure what to do.

Kelly, Lee and his family discuss tasks he can do independently around home, and which tasks he needs support with. Lee's parents also tell Kelly about the support the family can continue to provide and where they think Lee would benefit from regular formal support. They also discuss how Lee can learn new skills to help him get a new job in the future. They arrange a second needs assessment meeting the following week. Lee asks his family to attend again.

## Understanding whole-of-person needs

At their second needs assessment meeting, Lee, his family and Kelly discuss how Lee can become more independent to prepare him for moving out of home. Kelly suggests working with an occupational therapist to help Lee learn how to manage more tasks in his home and garden. Lee has talked with his friends from the ADE about leaving home and is pleased that two of them said they would like to try sharing a house with him. This gives him an incentive to learn daily living skills. Lee and his parents have also talked about what skills he might need to get a different job that he enjoys. Lee's brother thinks his local TAFE would be a good place for him to learn new work skills and meet people.

Kelly notes in Lee's needs assessment that he will need three hours of daily drop-in disability support to live safely and independently when he moves out of home, along with ongoing family support in the evenings and on weekends. Lee has never had paid services at home, so Kelly suggests he joins a peer support program in his local community hub or online. She tells Lee and his family that peer networks are safe places to share ideas, fears and concerns when trying new supports.

## Individualised budget

At their third meeting, Lee and his family agree on the needs assessment that Kelly has prepared based on all the information they have provided and discussed. Kelly will transfer this information to set a budget for Lee's support needs. The budget is set based on Lee's reasonable and necessary disability support needs. Lee will see his budget in the NDIS portal and can use his budget flexibly to pay for supports to participate in community activities he is interested in, continue to attend the ADE and start working with an occupational therapist to build his independent living skills so he can try sharing a home with two of his friends. Kelly recommends that Lee's budget is re-assessed in one year or earlier.

## Support from navigator

Lee is excited and nervous about his future. Kelly reassures Lee he will be supported by a local navigator named Matt who helps people with disability to find and use the supports they need and be included in their community. Kelly makes a video call to introduce Lee to Matt, and they meet for coffee a few days later to start work on Lee's action plan. They discuss how Matt can help Lee find community groups he's interested in, enrol at TAFE and link to foundational supports like the peer network. Matt will also help Lee to use his NDIS budget for supports to build his independent living skills to get ready to move out of home. Lee is now keen to start TAFE. Lee's family thinks Lee may have hearing loss, so Matt suggests they ask his GP to arrange a hearing test. The test shows Lee has mild hearing loss, so Matt helps Lee explain to TAFE that he will need to sit near the front of the room and he will need to see everyone's faces when they speak. They might need to make some adjustments to group work to make sure it isn't too noisy and so Lee can hear everyone clearly.

Lee starts TAFE with some adjustments for his intellectual disability and hearing loss. He finds classes a bit difficult but makes friends who help him. He talks about it with his brother who suggests some different ideas. He continues to go the ADE with his friends and also works with an occupational therapist for the rest of the year to build his independent living skills.

His disability peer network give him tips on living away from home and TAFE. Matt teaches Lee how to find and apply for a rental close to his family and links him to the state tenancy advice service. He explains that if Lee shares a house with his ADE friends, they will all get help from a shared support facilitator. When Lee's budget is reassessed within 12 months, Lee is more independent, he's enjoying TAFE and has made new friends. He is ready to look for a share home with his ADE friends and is happy Matt will support him.

## Proposed participant pathway

Participant pathway	Participant experience	Experience enabler
<b>Find out about disability and supports available</b>	Mainstream services are informed and equipped to refer people with disability to navigators and/or the right information to help them get the supports they need.	Mainstream services will understand their responsibilities and be connected with the NDIS and foundational supports.
<b>Access a navigator</b>	Navigation is consistently available for all people with disability across Australia and delivered locally by people who are connected and understand local communities.	Navigators are run locally, but are accountable to nationally consistent training and oversight.
<b>Access inclusive local and mainstream support</b>	Navigators will help people to find and coordinate support they need in their community and achieve what is important to them.	Mainstream supports are more accessible and foundational supports will be more available locally.
<b>Find out about the NDIS</b>	Navigators and the NDIA will help people with disability understand what the NDIS is, who it is for and how to make an access request if required.	The same accessible information will be available to participants, navigators and the NDIA.
<b>Apply to the NDIS</b>	Applicants can use a fairer and simpler approach to making access requests and providing evidence to support their request. They will have access to a navigator and mainstream and local supports while their request is being processed.	Evidence required for access will be clear and proportionate.
<b>Complete assessments to understand need &amp; set a budget</b>	A comprehensive assessment of need is undertaken by a skilled assessor. This will include a discussion of the risks in a participant's life and what safeguards could be put in place in response. Participants will have as long as they need to ensure they are understood and will be able to view the assessment and add missing information before the budget is set.	Skilled assessors will use self-reporting and strength-based interviews to assess need.
<b>Receive a budget</b>	Participants receive approved funding in a flexible budget and, if eligible, a home and living budget and stated supports for assistive technology, equipment, and other one-off capital costs.	Funding allocation process will be designed with people with disability and the sector.
<b>Develop a plan of action</b>	Participants are supported by navigators to develop a plan of action to use their budget in a way that meets their needs, and to implement safeguards to manage risk.	Navigators have access to specialist advice.
<b>Access supports</b>	Navigators can help identify potential supports and providers that may meet the needs of participants – this could mean helping to switch providers. Navigators help coordinate supports for those who need it.	Online platform supports participants and navigators to find quality providers in their area.
<b>Check-in on progress</b>	Participants get the level of support they need to make sure supports are working for them and that they have effective safeguards in place. Participants are trusted to spend their funds in a way that helps them live an inclusive life. Navigators help to quickly respond to change in circumstances.	Data is collected through the electronic payments system.

**Want more information?** Read the final NDIS Review report and recommendations, NDIS Review Guide, NDIS Review fact sheets and FAQ at [www.ndisreview.gov.au](http://www.ndisreview.gov.au)