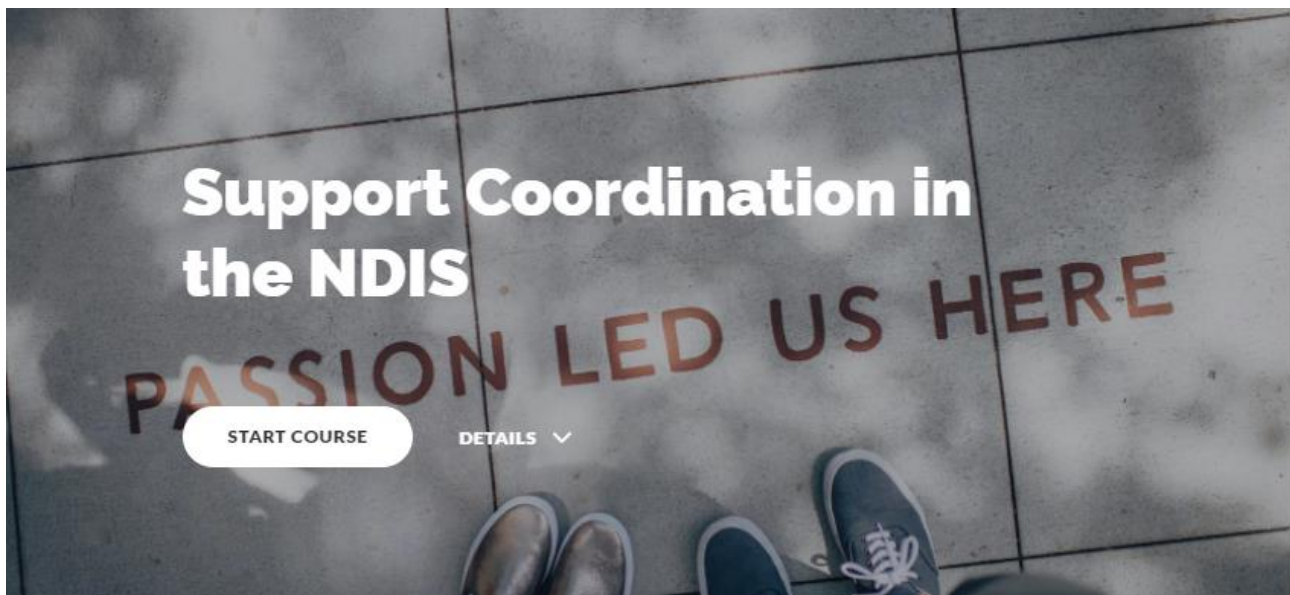


This PDF is available as an additional resource to complement the interactive training module.

Significant functionality is lost with the translation to PDF and we recommend all staff to complete the online version.



This training is designed for people delivering support coordination services to NDIS participants.

The information in this module is general in nature. Every organisation does things differently and has different policies and procedures, so please interpret the content in this module with your organisation in mind and discuss any discrepancies with your line manager.

Duration: Approximately 45 minutes (note. you can close the training and pick up where you left off at a later date).

Last updated: February, 2022

Content and links in this training were correct at the time of publication. We check these regularly; however, if you find broken links or errors please contact [transitionsupport@flinders.edu.au](mailto:transitionsupport@flinders.edu.au)

## Course Outline

- ≡ Training objectives
- ≡ COVID-19 update
- ≡ What is support coordination?
- ≡ NDIS participant portal
- ≡ Role overview
- ≡ Plan implementation

- ≡ Monitoring
- ≡ Plan review
- ≡ What makes a good support coordinator?
- ≡ Charging for your time
- ≡ Capacity building in practice



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## Training objectives

This module is for people providing support coordination services in the NDIS. It covers the purpose of the role, core responsibilities and working in the NDIS. You should also refer to your organisation for more specific training regarding your day-to-day responsibilities.

By the end of this module you will :

- ☐ Understand the purpose of the support coordinator role in the NDIS
- ☐ Understand what is expected of you as a support coordinator
- ☐ Understand your reporting requirements
- ☐ Know what skills and knowledge are required to be an effective support coordinator



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## Assumed knowledge

This module focuses on a specific role within the NDIS - that is - providing support coordination services. We have a number of training modules that cover NDIS topics that are relevant to the support coordination role which we also recommend that you complete. These can be found on the [training page of our website](#) and include:

- ☐ NDIS explained
- ☐ NDIS access and psychosocial disability
- ☐ Reasonable and necessary in the NDIS
- ☐ Preparing for NDIS planning meetings
- ☐ Understanding NDIS plans
- ☐ Service agreements in the NDIS
- ☐ NDIS plan reviews

## COVID-19 update

### COVID-19 changes

The NDIA have made a number of short-term changes to the way that people can use their NDIS funding as a result of COVID-19. Some of the content discussed in these training modules may not apply to the current context. A summary of the major COVID-19 related changes is discussed here, including links to further resources. These changes are likely to be reviewed in the coming months.

### Key changes

#### **New line items for support coordination**

From 25 March 2020, the support items for Support Coordination were temporarily duplicated into the Core Support Category – Assistance with Daily Life – so that participants can have greater access to support coordination services if they need them. Read more on the [COVID-19 updates Support Coordination page](#).

#### **Increased plan flexibility**

Core funding is now completely flexible, people with any core funding can use this funding to purchase any services/supports across the four categories. There are also several new capacity building line items to provide further flexibility using capacity building budgets and an easier process to request a transfer of funds from capacity building to core if necessary. This is a continually evolving space, we recommend staying up to date by regularly checking the NDIS ['using your budget'](#) updates.

#### **Phone planning**

Planning and review meetings are now held over the phone instead of face to face. Existing plans will be automatically extended by 12 months until a plan review can be scheduled. Read about planning on the ['your plan'](#) page.

### **Provider flexibility**

There are a number of changes to service delivery including broadening the criteria for charging for cancellations, and allowing an increased price loading in some circumstances.

All relevant information including updates, FAQs and information packs can be found on the NDIS Coronavirus information and support page.

### **Coronavirus (COVID-19) information and support**

We know that participants, their families and NDIS providers may be looking for workers to deliver disability supports, and provide extra cover at the moment. For participants, there are a number of online matching platforms that can help you quickly and easily connect to support workers.

[READ MORE NDIS](#)

## **What is support coordination?**

### **Support Coordination is about capacity building**

What do 'capacity building' supports look like in the NDIS? (select all that apply)

- ☐ Doing things with the participant
- ☐ Doing things for the participant
- ☐ Building skills and independence
- ☐ Supporting people to make their own decisions

SUBMIT  
TAKE AGAIN

### **The aim of support coordination**

First and foremost support coordination is a capacity building support. Support coordinators help people to get the most out of their NDIS plan and their broader support network.

As a support coordinator you are aiming to create a wrap-around system of care that includes NDIS funded supports as well as informal, community and mainstream supports.



#### **Mainstream:**

Supports available to all Australians through our public system - e.g., health, justice, housing, transport.



### Community:

Supports that are available to everyone in the local community e.g., sports clubs, library services and community centres.



### Informal:

Friends, family and carers.

A support coordinator, like all providers of capacity building services, should assist people to move toward being independent service users, exercising choice and control and engaging in the life that they choose.

## Types of Support Coordination

07	002	0106	8	3
Support category	Line item	Registration group	Outcome domain	Support Purpose
Support Coordination			Choice and control	Capacity building support

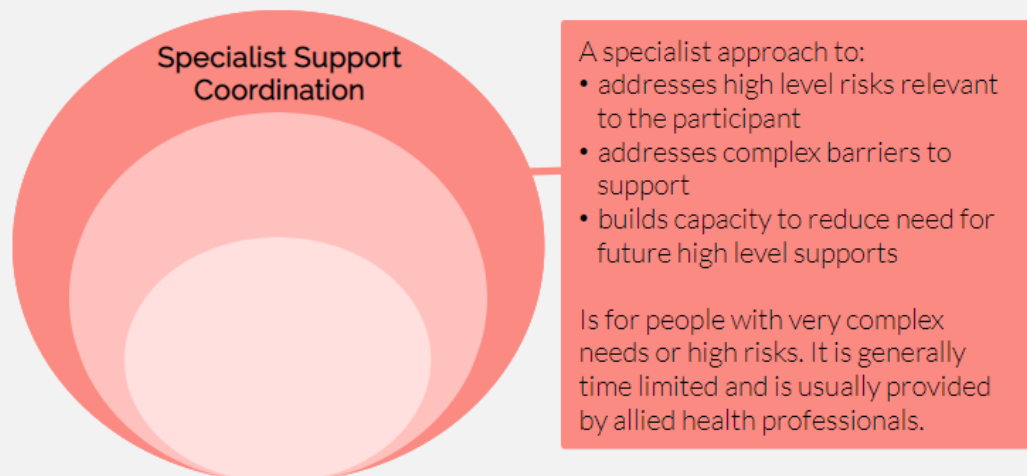
Support item number for level 2: coordination of supports

There are three levels of support coordination that can be funded in NDIS plans.

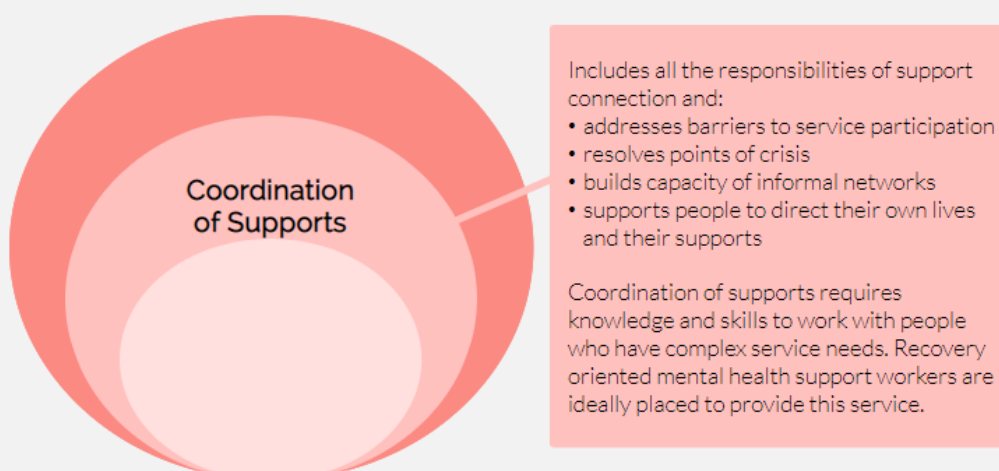
This training module is aimed at staff who are providing the second level of support - this is referred to a 'coordination of support' in the price guide, throughout this training we will simply refer to it as 'support coordination'.

*Interactive image: click to learn about the three levels of support coordination*

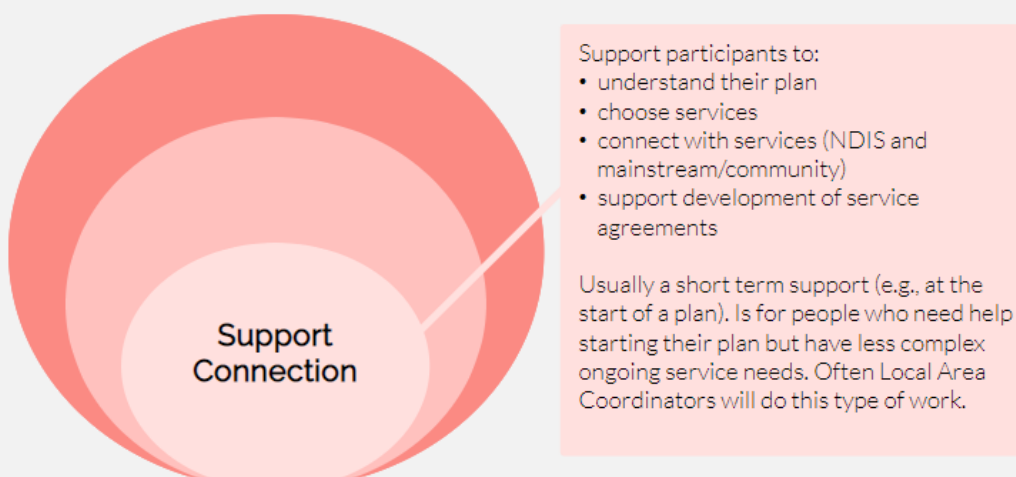
## Three levels of Support Coordination



## Three levels of Support Coordination



## Three levels of Support Coordination





## Who gets Support Coordination?



Complete our reasonable and necessary in the NDIS [training module](#) if you need a refresher.

Support coordination is for people who have high levels of complexity in their life. This can mean that they either have a large number of services to coordinate and/or they have complex needs related to their disability.

The decision to fund support coordination in plans is made in the same way that any other support is funded - by applying the reasonable and necessary principles.

## How many hours?

The amount of funding a person has for support coordination will vary. Like any other support in the NDIS - it depends on the person and their needs.

Consequently, how frequently you can work with someone will depend on their needs and their budget. Commonly the role is more intensive at the beginning (plan implementation) and end (plan review) of a plan cycle.



## FAQ

**Can people be funded for more than one level of support coordination?**



Yes, a single plan can include funding for different types of support coordination. For example someone with very complex needs may be given a limited amount of funding for a specialist support coordinator to begin the plan, and funding for a support coordinator to support the person with the plan over the year.

### **Will everyone with a psychosocial disability get support coordination?**

No, the decision to fund support coordination in a person's plan is made in the same way that all funding decisions are made-applying the reasonable and necessary principles. A planner will determine at the planning meeting if the person requires support coordination.

Useful evidence that a person can bring to a planning meeting to show why support coordination is needed includes; a summary of the varying and complex supports that a person will need to access, and a description of how the person's functional impairments make it difficult to coordinate these supports without assistance.

### **Will support coordination funding decrease after the first plan?**

The decision to allocate funding for support coordination in each plan depends on the reasonable and necessary criteria. Each time the person receives a new plan from the NDIA they will decide if support coordination is necessary and how much is required. As a person becomes more confident managing their own supports the need for support coordination should decrease. However, this will depend on the individual and their needs.

### **Do support coordinators need specific qualifications?**

Only people who provide specialist support coordination will be required to have specific academic qualifications. This is because this support is usually provided by allied health professionals (e.g., psychologists, occupational therapists, social workers).

To provide coordination of supports (level 2) providers should have experience in working with complex populations and can be disability support workers, peer workers, welfare workers, allied health workers, developmental educators or Aboriginal health workers. The NDIA do not require specific qualifications to deliver this level of support, however organisations may choose to recruit staff with specific skills or qualifications.

For all levels of support coordination, experience working in the sector with complex participants will be beneficial. Throughout this training we will talk about the skills and knowledge of support coordinators, many of which will draw on skills you already have.

## **Role overview**

When do support coordinators start to work with participants as paid service providers in the NDIS? Click on the pathway below to show where you think support coordination sits on the NDIS pathway.



## Request for service



Once a person has their plan and had been given funding for a support coordinator they can nominate who they want their support coordinator to be. An NDIA representative (LAC or planner) will send a 'request for service' to the support coordinator's organisation. The request will describe the expectations of the support coordinator, provide some information about the support needs of the person and expectations regarding reporting.

Once the request is accepted you can work with the participant to set up a service agreement and start to provide support coordination services.

## Three phases of support coordination

Support coordinators have a role in helping people to use their plans and manage their services from start to finish - click on the image below to learn more about the three broad phases of support coordination.

## Three phases of Support Coordination



### Plan implementation

The first phase is all about meeting the person and setting up their supports. Usually it will involve learning about the person, their goals and the types of supports they want to access. After that you will help them get in touch with appropriate providers and set up their services.

### Plan review

Before a person goes for their plan review you will likely work with them to prepare for their next plan. This will involve discussing participants service use, their progress toward their goals, and any barriers/challenges accessing services.

### Monitoring

During this time you will be making sure the person is accessing services, that their support network is strong and that you are building their capacity to manage their own supports. You will also support them to manage any points of crisis.



Often more intense support coordination is required early in the plan. Once the participant has regular supports in place, they may require less intense support coordination for monitoring and review. Remember to discuss how the hours will be used when establishing a service agreement with the participant. See our 'service agreements in the NDIS' training module for more information.

## Support Coordination in the NDIS landscape

Click on the flip cards below to learn more about where the support coordination role sits in relation to other key NDIS providers and principles.

### Advocacy

Support coordinators are not paid advocates. This means that if you are working with someone who needs advocacy support (e.g., to review an NDIS decision) you would need to link them to a formal advocacy service. However, you can work with participants to build capacity to advocate for themselves. You can also help them to ensure that they are getting what they need from their service providers.

### Local Area Coordinators (LACs)

LACs are funded by the NDIA to support anyone who wants more information about the NDIS and to help people to use their NDIS plans. People who don't have support coordination funding can go to their LAC to get help with their plan. Generally, LACs are there to help people who have less complex support needs.

### Plan managers

Plan managers are registered NDIS providers, who provide financial and administrative support to people who have plan-managed funding. They can help people to negotiate the financial terms of a service agreement, pay invoices and make sure that plan funding is used correctly. They do not support people to identify the types of services they want to access or the way that the service will be delivered, that is the support coordinator's job.

### Conflicts of interest

Organisations who provide both support coordination services and other NDIS services need to have structures and policies in place, to manage conflict of interest and show how they support choice and control when helping people identify a service. See our [conflict of interest article](#) for more information.

## Plan implementation

The first important part of the support coordination role is to meet the person and help them to start accessing services - this is called plan implementation.

### Steps involved in plan implementation

We use the term 'plan implementation' to refer to the time you spend helping the participant to set up their supports. These are the things you will generally do in this first phase.

START >

#### Step 1

**Meet the person and determine their service needs**

The first step in plan implementation is meeting the person. You need to know what they have funded in their plan, what their goals are and what types of services they would like to access with their funding. You also need to know about their life and their informal support networks.

Tip: make sure you know how plan funding could be used and how to 'translate' this into services and supports. If you need help with this see our ['understanding NDIS plans' training module](#).

## Step 2

### **Help set up the participant portal**

The NDIS participant portal is called Myplace. It is a secure website for participants or their nominee to view their NDIS plan, request payments and manage services with providers. Often you will help a participant to set up their account on Myplace and show them how the portal works if this is something the participant wants.

You can read more about Myplace and find user guides on the [NDIS website](#).

## Step 3

### **Identify suitable services**

Once you know what services a person wants to access you can start looking for organisations in the area who might be able to provide the service. The participant may have a service provider in mind or you can provide a list of possible options. Remember to maximise choice and control as much as you can here by offering multiple providers for each service.

Our [training module 'Service agreements in the NDIS'](#) provides more information on finding suitable providers.

## Step 4

### **Set up service agreements**

A service agreement is the contract between the provider of supports and the participant. Often a support coordinator will help people to set up service agreements by supporting them to talk to the provider about what they want from the service and/or reviewing service agreements with the person to make sure they are adequate for the person's needs.

Our [training module 'service agreements in the NDIS'](#) provides more information on service agreements.

## Step 5

### **Don't forget informal and mainstream supports**

Remember it is part of the support coordinators job to make sure a person has a supportive, wrap-around system of services including mainstream and informal supports.

Explore what mainstream services the person may also be able to access and discuss the role of their informal support networks.

Tip: don't forget free services, you can make NDIS funding go a lot further if you have good local knowledge of free community services (e.g., computers at the library, free yoga classes) that a person can access to address their goals.

## Step 6

### Identify potential points of crisis or barriers to service engagement

It is important that you work with the person to identify any potential crisis points (e.g., an aging carer) and barriers to service engagement (e.g., participant has disengaged from services in the past) and strategies for resolving these.

## Time commitment



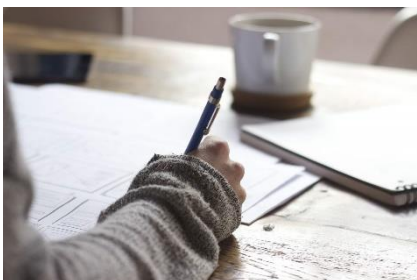
This is one of the more time-intensive parts of the support coordination role. Some people will need more intensive initial support than others but you will always need to allow a good amount of time at the start to get everything running smoothly. After that you can work with the person to see how much time is left and how that can be spread across the rest of the plan.



Once I know what types of services a person wants to use I always try and talk to them about at least 3 different service providers for each support, so that I can be sure I have supported choice and control.

**Tip from a support coordinator**

## Reporting



The NDIA will specify any reporting requirements for your participants. It is good practice to prepare a progress report that describes how you have helped a participant to implement their plan. This can be really helpful information at plan review, it is also a good way of documenting what you have done in case anything goes wrong.

The NDIA have a progress report template which is usually sent out with the request for service for support coordinators to complete approximately 8 weeks after they have started working with the person.



Refer to the reporting template to see the reporting requirements for the participant you are working with, in general you are likely to be asked about:

- ☐ the number of providers engaged and how many have a service agreement in place.
- ☐ how well the participant is connected with informal and mainstream supports and what you have done in this area.
- ☐ how you are ensuring choice and control (e.g., have suggested multiple service options, have conflict of interest policies in place).
- ☐ how you are building capacity for the participant to better understand the NDIS (e.g., do they understand their plan?)
- ☐ potential points of crisis and barriers to service use that you have identified - including strategies that have been put in place to address them.

## Key challenges

Finding suitable providers can be challenging, particularly in rural and remote regions, or when people are looking for unique/specialised services. If you find yourself struggling to find providers there are two important things you need to do.

### Explore alternatives

- Consider if there are different services that will help the person with the same goal.
- Could you find an unregistered provider who can help? (noting you would need self or plan managed funding to do so).
- Could the person travel to access a service in another region?
- Could you encourage a provider to travel to visit the person (perhaps more participants in your region would need this too and make it worth their while)?

### Document everything

It is really important to document how you have addressed barriers to implementation including what alternatives you have explored and if these were successful. You can use this evidence at plan review to show the NDIA where there were difficulties using funding.

## Budgeting

The NDIS Support Catalogue lists the hourly price for supports. You will notice that the hourly rate varies considerably from one support type to the next. There are also different rates for weekend work, night shifts and group programs. If you are helping someone to work out how they can spend their budgets you might want to ask the following:

- ☐ How frequently do they want to access the service?



- ☐ Do they want to be able to spread out their service access over the year or is it a short-term support?
- ☐ Do they like group programs or prefer to access individual supports?
- ☐ Will they need support on weekends?

Here is a simple example of how to use the Price Guide to identify service options and break down the budget into a service plan for the year.

START >

## Step 1

### The budget

Capacity Building Supports	Budget
<p><b>Increased social and community participation (CB social, community and civic participation)</b></p> <p>Supports to build my skills so that I can participate in community, social and recreational activities.</p> <p><b>My Increased social and community participation funding will be:</b></p> <ul style="list-style-type: none"> <li>\$3,000 NDIA-managed</li> </ul>	<p><b>\$3,000</b></p>

Here is a budget for Cassie, an NDIS participant whose goal is to make some friends and become more active in her community. She has been given \$3,000 to use for services in the 'Increased social and community participation' category.

## Step 2

### The service options

Support Category N	Support Item Number	Support Item Name	Support Item Description	Unit	Price Controlled	Quote Required	National Non-Remote (MM 1-5)	National Remote (MM 6)	National Very Remote (MM 7)	Travel	Cancellations	NDA Reporting	Non-F2F
Increased social and community participation	09_006_0106_6_3	Life Transition Planning Incl. Mentoring, Peer-Support And Indiv Skill Develop	Establishing volunteer assistance within the participant's home or community to develop skills. For instance, assistance in attending appointments, shopping, bill paying, taking part in social activities and maintaining contact with others.	H	Y	N	\$60.16	\$84.22	\$90.24	✓	✓	✗	✗
Increased social and community participation	09_007_0117_6_3	Skills Development In A Group	Training for the participant in a group of 2 or more to increase their independence in daily personal activities.	H	Y	N	\$29.26	\$40.96	\$43.89	✓	✓	✗	✗
Increased social and community participation	09_009_0117_6_3	Individual Skills Development And Training	Individual life skills development and training including public transport training and support, developing skills for community, social and recreational participation.	H	Y	N	\$58.52	\$81.93	\$87.78	✓	✓	✗	✗

Price Guide options (click to zoom) for social and community participation mean Cassie could access the following:

- a) 49.9 hours of life transition planning (3000/\$60.16)
- OR
- b) 102.5 hours of skills development in a group (3000/\$29.26)
- OR
- c) 51.3 hours of individual skills development and training (3000/\$58.52)

### Step 3

## Breaking down the budget

<b>Support:</b> Individual skills development and training (this will involve meeting with a support worker once a fortnight for training to use public transport, social skills development and support to participate in social activities)			
Number of hours	Cost of the support	Total cost	Total budget – support cost = remainder
26	X \$58.52	= <b>1,521.52</b>	3,000 – 1,521.52 = <b>1,478.48</b>

There are many different combinations of group or individual supports that could be accessed with this budget. Talk to Cassie to see if she has a preference. For example, if she wanted to access individual supports for an hour (\$58.52) once a fortnight (26 times a year), she would have \$1478.48 left to spend on other supports in that category, like group activities.

## Summary

As you can see there are many ways a budget can be broken down into different combinations of services and it will depend on the person's budget, their goals and their choices.

## FAQ

### **Can I access the participant portal?**

No, you can only do this with the person present. Support coordinators often help the person to set up their portal and will help them to use the portal to manage services throughout their plan.

### **Do I need to get consent to call the NDIA on the participant's behalf?**

Yes, you will need to get the participant's consent to contact the NDIA on the person's behalf. To do this, it is easiest to call the NDIA with the participant present and arrange either for your name to be added to the person's file as an appropriate contact person or ask for a consent form to be sent to the person to complete.

### **How do I view a participant's plan?**

The plan belongs to the participant so you will need their permission to view it. They may choose to show you a hard copy or share their plan via email. There is also an option for the participant to share their plan with providers via the portal, you can read about that on the NDIS website at ['sharing your plan'](#).

### **Can I use the list of providers on the NDIS website to find services?**

The NDIS website includes [a list](#) for each state of the providers who are registered to provide NDIS services. It is a useful starting point for you to identify options, however we recommend keeping your own lists of providers that you know are suitable in your area.

### **How can I help people to access services if they don't have transport funding?**

As a support coordinator it is important you understand the rules of charging the NDIS for travel costs. Some providers can charge for their time traveling to and from a participant, in remote settings. Providers can also sometimes quote for their services and include a travel component. It is a good idea to check what options are available to have the provider come to the person or if phone or internet resources can be used. If not then the person might consider 'bundling' their further away supports together and taking a trip every month or so (depending on need) to access these all at once and save on travel costs. We have put together some [transport resources](#) that can help with this.

### **Where can I get the report templates?**

Report templates should come from the NDIA with the request for service. If you have not been provided with these for a participant you can contact your local NDIA office to ask for one. If you don't have a contact at your local office you can try [enquiries@ndis.gov.au](mailto:enquiries@ndis.gov.au).

Remember that the NDIA will specify any reporting requirements for the participant you work with, the information in this module is the general reporting approach but may differ from one person to the next.

## Monitoring

Once a person has their services and supports in place a support coordinator monitors the participant's service use until plan review. The main responsibilities of a support coordinator during this time are:

- ☐ Making sure that people are accessing the services that they need
- ☐ Making sure providers are delivering services in line with their service agreements
- ☐ Building capacity for participants to manage their own plans and supports
- ☐ Supporting participants to strengthen their informal networks
- ☐ Helping in times of crisis or increased service need
- ☐ Ensuring mainstream and community services are utilised

## Reporting



Check your request for service to see if the NDIA require any formal reports from you at this point. If not, it is still good practice to keep a note of what you do with the person during this time. If there are crisis points make a note of what they were, what you did and the impact on service use. If the person disengages from services or changes service providers, note this and the outcomes. All of this will help when it comes to plan review.

Many organisations will already have reporting systems in place to keep track of

your work with participants. Refer to your organisation's policy or speak to your manager if you aren't sure.

## Time commitment



If the person doesn't need much help keeping their services on track then you will probably just need to check in on a schedule you arrange with the person. If there are crisis points or major service challenges you'll need to be more involved. Experienced support coordinators recommend keeping a 'buffer' of time up your sleeve for emergencies. The best bet is to be flexible, if things don't go as planned that is fine, just keep an eye on the budget as you go.



## Key challenges and solutions

Even though this part of the role is usually less time intensive it is also the time when a lot of new challenges can pop up. Here are some of the main challenges and how you can address them.



### Keeping people engaged with services

There will be times when people don't want to use their services. This could be because they don't like their provider, because they are having a tough time and have disengaged, or because they no longer think they need that type of support.

It is important that you check in with participants regularly and identify why they have stopped using a support. Then work with the person and/or the provider to troubleshoot.

### Switching providers

A lot of people you work with will be accessing services for the first time, or they will be used to the old way of service delivery where they often didn't have a choice about who delivered their service.

You need to make sure participants know that it is ok to change providers if something isn't working. You can build a person's capacity to exercise this choice and control by making sure that:



- they are aware that they can change
- asking them when things aren't working and why
- coaching them to talk to their providers if they have questions or concerns
- supporting them to change their service and find a new provider
- checking service agreements include necessary information and appropriate change policies (and empowering participants to know what to look for in future agreements!)



Part of our job is to make sure that services are delivered in line with the participant's goals. If a service was engaged to upskill someone to cook and clean but you don't see that happening- call them and ask why.

Tip from a support coordinator



### Managing times of crisis

A crisis can include a carer becoming unwell and a person's informal network changing, a person having a particularly bad time, a change in housing, a change in income and many more.

Support coordinators help people to work through a crisis and identify solutions (e.g., increase supports, pause supports if a person is in hospital, identify alternate supports).

A support coordinator is however, not the only point of call for someone when they are distressed. It is also important that you build a strong network of other service providers and informal supports that can assist.



When we are linked to someone and it's the first ever service they have received they think you will fix everything. So managing people's expectations can be quite tricky. If they do get into a crisis situation you are the first person they call. You need to clarify what you can do and what you can't, and help them to build the same rapport with their other providers and informal networks.

Tip from a support coordinator

## Knowing your role

A support coordinator role can sometimes be viewed as a 'jack of all trades' type job. We often hear that support coordinators find themselves being asked to do things are the responsibility of another provider.

It is really important to know what you can do and what you can't (this training will help with that). Know that you can stand your ground and push back- doing so means that you use your time wisely and build the capacity of other services to step up when they are needed.



## Plan review

Throughout the year you will have been supporting participants to use their plan, when it comes to plan review you can help them reflect on what has and hasn't worked so they can continue to progress toward their goals.

## Preparing for plan review



Your main role as a support coordinator at this time is to help participants to prepare for their plan review by reflecting on service use to date and their goals. Often you will complete a plan review report with them which will be provided to you by the NDIA. This is usually done a few months before the person's plan review meeting.

The report is to be completed with the person, make sure you meet with them during this time and ensure that the report captures their views on how they want their next plan to look. Below is a summary of the types of things you should think about when preparing for plan review.



## Preparing for plan review

Here are some things to consider when preparing for plan review.

START >

### Step 1

#### Reflect on current goals

You'll need to refer to each goal, list the types of supports that the person has accessed to help them achieve this goal and whether or not the goal needs to continue in the next plan. You'll also need to make a note of any barriers that are making it difficult for the person to progress toward their goals.

### Step 2

#### Consider new goals

Ask the participant to think about each of their goals and whether they want to remove them, change them, or add new ones. For each new goal consider what strategies/services/supports will be needed to achieve them.

### Step 3

#### Update informal and mainstream supports

Each new plan will need to include a summary of the person's informal and mainstream support systems so make sure you have documented these as well.

### Step 4

#### Support needs

You will need to include a list of supports that a person is accessing for each funding category in their NDIS plan and how much money has been spent on each.

You will then need to indicate whether the support should continue - and if so, does the funding need to be increased or decreased and why.

If the person is going to need additional supports - that will require a different funding category you'll need to discuss that as well.

### Step 5

#### Risks

Note any risks that were identified while working with the person over the last year. Risks include any instability with informal care arrangements, potential instability in housing, problems managing finances, problems maintaining employment and so on.

## Step 6

### Need for support coordination

Finally you should reflect on what you have done with the person during the year, how much support coordination funding was used and any barriers you experienced engaging with the person and/or implementing their plan.

Importantly, if support coordination is to be included in their next plan you should say why this is still needed. For example, does the person still need support to manage their services? Will the person need significant support implementing their new plan? Are the person's goals changing - for example will they need support to progress some long term goals like independent living or employment?

### Summary

That covers the basic elements of preparing for a review - participants can take your report with them to the meeting along with any new assessments or reports from providers that provide evidence for ongoing supports. See our [NDIS plan reviews module](#) if you want to know more about the review process more broadly.

## Goals, goals, goals



As you can see - goals are really important at plan review and the NDIA really want to know how supports align with goal progression. Keep this in mind the whole time you are working with someone so that you aren't caught out at review time.

## Use it or lose it - dealing with unspent funds

Remember- after the plan review meeting the NDIA will issue the participant with a *new* plan. Unspent funding does not roll over from one plan to the next. In fact, unspent funding is a red flag at plan review.



Often funding isn't spent because there were issues engaging a suitable service. If this is the case, you need to make sure this is clearly explained, including what you did to try and use the funding.

If money isn't spent it suggests to the NDIA that the support (and by extension, the funding) wasn't needed. If the funding needs to be included again in the new plan you'll need to explain how you will overcome the challenges in spending it.

## FAQ

### **Will the support coordination hours in a plan decrease every year?**

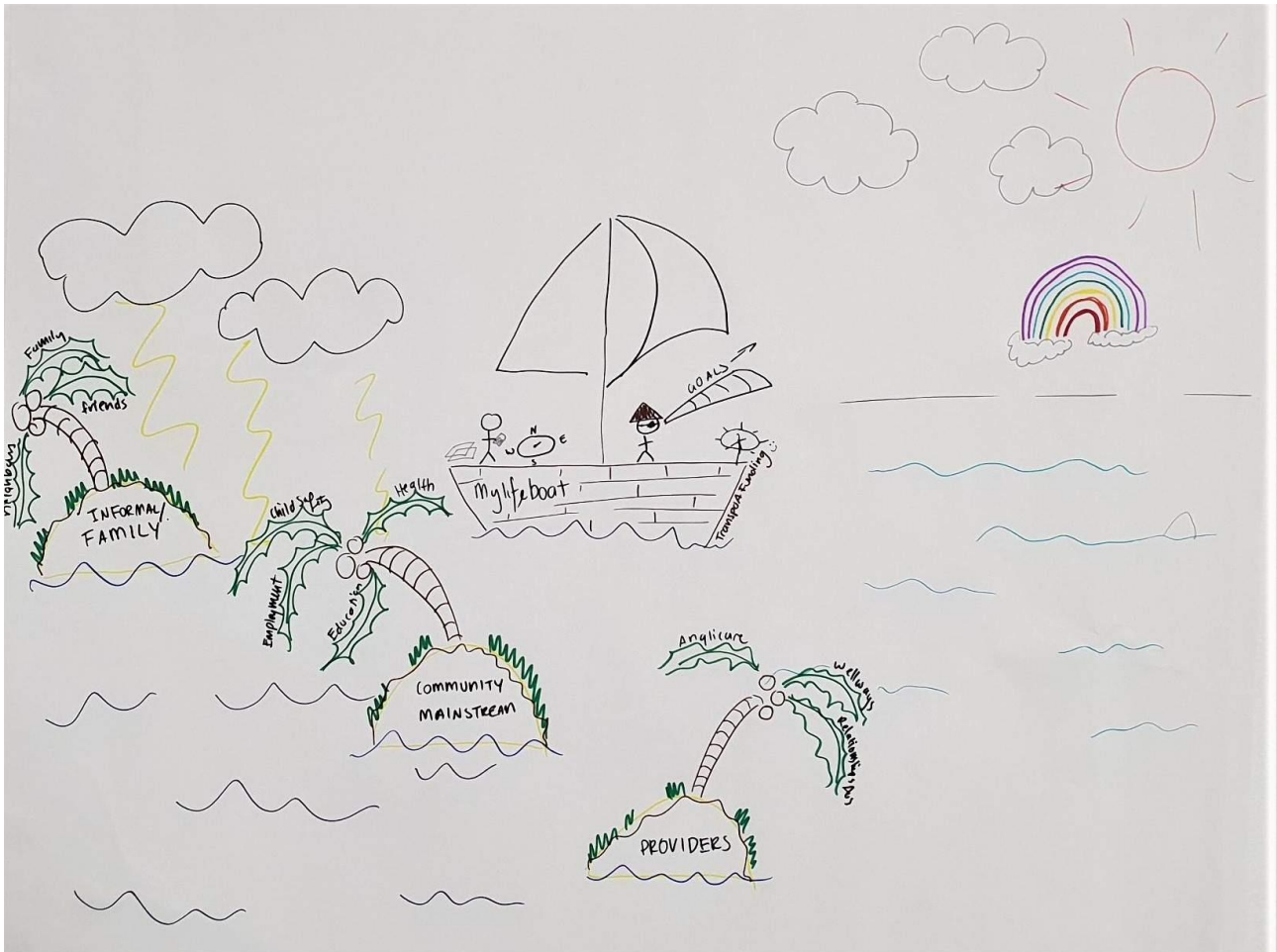
It is the role of a support coordinator to help people to implement their plans and manage their services whilst building capacity for the person to one day do this themselves (or with less support). For some people this will mean that their need for support coordination will decrease after the first plan, for others it may take longer until they are able to reduce their need for support coordination.

Support coordination hours should only decrease when a person is doing well enough that they don't need as much support. If the person is not at this point yet then make sure you clearly describe why significant time is still required in the plan review report.

# What makes a good support coordinator?

Click on the image below to learn about the knowledge required to be a support coordinator in the NDIS.

*Image attribution: this fantastic picture of the support coordination role was developed by attendees at a transition support workshop in Tasmania in 2018.*



## Family and friends

Support coordinators understand the importance of informal networks and will work alongside, and build the capacity of carers and other informal supports.

## Community and mainstream

Support coordinators understand the responsibilities of the mainstream and community systems and know what options are available for people with psychosocial disability.

They know how to get the most out of NDIS plans by making sure mainstream and other community services are utilised.

## Your local area

Support coordinators know the providers in their region, what they do and what populations groups they work with. They have strong relationships and are always looking to build new ones.

## **Recovery oriented**

Support coordinators work from a recovery approach which means they:

- do things with (not for) the participant
- identify and build on strengths
- build skills and independence
- think outside the box and be creative
- understand the needs of people with psychosocial disability

## **NDIS knowledge**

Support Coordinators understand the NDIS and know how to work with the NDIA. We have covered a lot of essential NDIS information in this training and in our other training modules.

Keep up to date on the NDIS by attending training where possible, signing up for email alerts from the NDIA and other trusted advisors (lust us!) and talk to your colleagues.

## **Person centred**

Support coordinators know how to support people to make real choices, to direct their own supports and to help them to develop a wrap around system of support.

# **Core competencies of effective support coordinators**

Above we listed some of the knowledge that support coordinators will need to work in the NDIS space. Now lets think bigger - what are the broader skills or competencies that make someone a good support coordinator?

## **Adaptability**

Support coordinators are flexible, they know how to respond to changes and are always ready to try new approaches.

## **Building partnerships**

Support coordinators are collaborative, they build effective relationships with other NDIS providers, mainstream services, family, friends and the community.

## **Building trust**

Support coordinators know how to build rapport, they treat people with respect, dignity and fairness.

## **Developing others**

Support coordinators help participants - and their broader network- to build their independence and skills.

## **Negotiating and influencing**

Support coordinators know how to influence others, they negotiate well and stick to their key objectives.

## **Planning and organising**

Support coordinators are well prepared and know how to use their time effectively.



## **Creativity**

Support coordinators need to think outside the box. They can think of new solutions to tricky problems and thrive on innovation.

## **A learning mindset**

Support coordinators take advantage of opportunities to upskill and learn, they keep themselves up to date on everything NDIS.

## **Stop and think**

Consider the knowledge and competencies that we discussed above:

- ☐ Are there any core competencies, skills and knowledge that we haven't discussed? What might they be?
- ☐ How do these skills, knowledge and competencies resonate with you? Do you have these skills already? What else do you need to learn?
- ☐ How might you use this understanding of the role to guide your day-to-day responsibilities as a support coordinator?

## **Charging for your time**



One of the biggest shifts from the previous way of working to working in the NDIS is understanding how to charge for your time.

As a support coordinator you will need to be careful with your time and make sure you prioritise some activities over others. Sometimes this might mean getting others to help you or delegating tasks to other providers instead of simply doing it yourself.

Whilst this might be frustrating or different at first - remember that the better the person and their supports operate without you - the better job you are doing!

## What can I charge for?

Support coordination is a big role which includes a lot of different activities. You can charge for anything you do that relates to the main components of the role, and that involves working directly with, or in support of, the participant including (but not limited to):

- ☐ Researching providers and finding suitable service options
- ☐ Meeting with other providers (including phone calls)
- ☐ Supporting a person to review service agreements
- ☐ Meeting with the person to discuss their plan, their services or their goals
- ☐ Calling the person to check how their plan is going
- ☐ Supporting a person when in crisis
- ☐ Preparing reports for the NDIA
- ☐ Short notice cancellations (for scheduled supports)
- ☐ Time spent travelling to support a participant, up to a maximum amount, and travel from your last participant back to your usual place of work.

### **You *can't* charge for:**

- Lunch breaks or coffee breaks
- Professional development, supervision or training
- Activities that would be considered formal advocacy e.g., disputing NDIA decisions
- General administrative activities e.g., entering participant details into client management system



For more information on pricing arrangements and charging principles, refer to the NDIS price guide and support catalogue, available on the [NDIS website](#).



# Capacity building in practice

In this module we have gone over the main responsibilities of support coordinators in the NDIS. Now let's use your understanding of the scope of the role to see how you might work with someone day-to-day. For many of these scenarios there may be more than one correct answer so use think of these as a learning opportunity not a quiz!

## Support to access mainstream providers

You are working with Sam, a new NDIS participant. Sam has not really had much engagement with services in the past and needs help linking to a number of mainstream providers.

CONTINUE

A crucial step toward helping Sam achieve his NDIS goals is to become more independent with his finances. He wants to apply to access the DSP but is really anxious about the process. Do you.....

- 1 Complete the DSP paper work for Sam so that he can address this need quickly.
- 2 Have a chat with Sam to see which aspects are making him anxious.



Sam is anxious because he has had bad experiences with government services in the past, he is really hesitant to talk with anyone and is worried he will make mistakes in the paperwork. Do you.....

- 1 Ask Sam if he has a friend or family member that could help him with this.
- 2 Call the DSP helpline to see what support they offer.
- 3 Show Sam the DSP website and talk him through the process of applying online, agree to be his point of contact if he needs any help.

## Feedback

The best options here are to use existing networks to help Sam apply for a DSP. How much additional time you spend building Sam's capacity will depend on his individual needs and support networks.

## Monitoring services

You are working with a participant, Maxine, she has started using her plan and has multiple service providers she works with to progress toward her goals.

CONTINUE

A provider who works with Maxine needs to cancel an appointment. They call you and ask you to pass the message on to Maxine and arrange a new time. Do you.....

- 1 Ask why they are not able to contact Maxine directly
- 2 Agree to call Maxine and ask what other times will suit

The provider tells you that they don't feel that they have a good rapport with Maxine and are worried about how she will react to the news of a cancellation. Your next steps are.....

- 1 Call Maxine and ask her how she feels the service is going
- 2 Agree that you don't want to upset Maxine and that you will manage all communication between the provider and Maxine in the future
- 3 Ask the provider to explain what they have been doing to build rapport and what challenges they are facing.

## Feedback

The best options here are to start conversations about service difficulties so you can try to resolve them with both parties.

## Considering support needs

You are working with Amara, she is new to the NDIS and has been working with you for two weeks. You are helping her to engage providers and think about how she will use her plan.

CONTINUE

Amara has missed a couple of GP appointments recently. When you talk to her about this she says that she will go if you can take her there and sit with her. Do you....

- 1 Agree to do this so that Amara can address her health concerns and start using her other services.

- 2 Ask Amara to explain what challenges she is having getting to the GP and why she wants support at the appointment

Amara tells you she is not comfortable on public transport or in taxis. She is also uncomfortable with doctors and gets anxious at appointments. She would feel more comfortable with you helping her.

- 1 Have a look at Amara's plan - does she have funding that could be used to help her with her anxiety regarding public transport and doctors?
- 2 Ask Amara if there are any family members or friends that might be able to go the appointment with her.
- 3 Agree to attend the appointment with her, it is important that she gets her health issues under control.


### Feedback

The best options here are to consider how Amara can build her capacity to overcome this challenge in the future through funded and/or unfunded supports, as opposed to providing short term solutions.

## Takeaways

The role you play in supporting someone to set up their support network is going to vary depending on the person, their existing networks and relationships, and their service needs. If you are unsure about your role in specific scenarios ask yourself:

- 1 How much time will this take? Is this an important use of my time or will it stop me helping in other areas?
- 2 Is it reasonable to expect family and friends to help? Does the person have a good network of family and/or friends?
- 3 Am I duplicating the work of other service providers?
- 4 Am I building capacity or building dependence?



Congratulations you have finished the  
'Support Coordination in the NDIS' training  
module.