

## Summary

This Practice Guide is designed to assist Life Without Barriers (LWB) Support Coordinators to access current information and practice guidance to undertake their work, as well as gain a detailed understanding of how to deliver best practice Support Coordination in line with both the [NDIS Act 2013](#), and the [NDIS Practice Standards and Quality Indicators](#).

For convenience, information has been broken into sections to allow quick access to the area of interest. Direct links to resources including those hosted by Life Without Barriers (LWB), the National Disability Insurance Agency (NDIA) as well as external web pages have also been provided.

**Participant** is the term used by the NDIA to describe a person with disability who receives funding through an NDIS Plan.

This Practice Guide uses the term **Support Coordination** throughout and refers to the delivery of all three levels of NDIS-funded Support Coordination. This guide should be read in conjunction with the [NDIS LWB 5301 Support Coordination – Procedure](#) which offers step by step guidance in line with LWB’s Disability Pathway Signature Process including how to:

- respond to a Request for Service from the NDIA,
- initiate and deliver Support Coordination through LWB to individuals
- manage LWB’s potential Conflict of Interest when delivering Support Coordination.

As many different types of documents will be drafted using this template, we do not have a single prescribed structure that will suit all documents. You may, however, consider whether the following headings are appropriate for the document you are developing.

## What is Support Coordination?

Support Coordination is an LWB product and describes specific types of supports funded for people with disability by the National Disability Insurance Scheme (NDIS), via the National Disability Insurance Agency (NDIA). Support Coordination is provided to NDIS Participants in their NDIS Plan to support the progression of their plan. This type of support involves the participant as a ‘partner in action’ with the Support Coordinator.

Support Coordination can include initial assistance with linking participants with the right providers to meet their needs, assistance to source providers, coordinating a range of supports both funded and mainstream and building on informal supports, resolving points of crisis, parenting training and developing participant resilience and abilities to coordinate and implement supports and participate more fully in their network and community.

Life Without Barriers (LWB) offers all three levels of Support Coordination funded by the NDIS. The three items within the NDIS Price Guide describing the different levels of Support Coordination are:

**Level 1** – Support Connection

**Level 2** – Coordination of Supports and

### Level 3 – Specialist Support Coordination

The current [NDIS Price Guide](#) should be referred to for the full definitions and rules associated with Support Coordination.

Within LWB’s Support Coordination product, these three support items are called:

LWB Product Name	NDIS Support Item Name
Support Coordination - Connection	Support Coordination
Support Coordination - Coordination	Coordination of Supports
Support Coordination - Specialist	Specialist Support Coordination

All these supports are based on ensuring the person with disability builds as much decision-making capacity as possible. Ideally, the client will actively take on some or all of the coordination role, including their plan and budget management needs.

## Level 1 – Support Connection

This support item assists a participant to understand and implement their plan by strengthening their ability to connect with the broader systems of supports, understanding the purpose of the funded supports and providing assistance to connect with providers. Support Connection will assist participants to achieve effective utilisation of their NDIS plan and answer questions as they arise.

Support Connection also increases a participant’s capacity to maintain (or in some cases change) support relationships, resolve service delivery issues, and participate independently in NDIA processes. Support Connection includes, but is not limited to:

- Understanding the Plan;
- Connection with Supports and Services;
- Establishing Supports;
- Coaching, Refining, Reflection; and
- Reporting to the NDIA.

This type of support may be provided through Local Area Coordinators (LACs). LACs are external organisations that are funded partners of the NDIA. They operate at a local community level, enabling the NDIS to be implemented with consideration of issues within local communities. LACs also work with those people who are not eligible to receive NDIS funding.

## Level 2 - Coordination of Supports

This support item assists to strengthen a participant's ability to design and then build their supports with an emphasis on linking the broader systems of support across a complex service delivery environment.

Coordination of Supports is to focus on supporting participants to direct their lives, not just their services, and is focussed on assisting participants to build and maintain a resilient network of formal and informal supports.

This involves working together with participants to understand funding, identify what participants expect from services, and how participants want these designed. Coordination of Supports also includes coaching participants and working with participants to develop capacity and resilience within their network.

Coordination of Supports includes, but is not limited to:

- Understanding the Plan;
- Connection with Supports and Services;
- Designing Support Approaches;
- Establishing Supports;
- Coaching, Refining, Reflection;
- Targeted Support Coordination;
- Crisis: Planning, Prevention, Mitigation and Action;
- Building Capacity and Resilience; and
- Reporting to the NDIA.

## Level 3 - Specialist Support Coordination

This support is delivered utilising an expert or specialist approach, necessitated by specific, high complex needs or high-level risks in a participant's situation. Specialist Support Coordination is delivered by an appropriately qualified and experienced practitioner to meet the individual needs of the participant's circumstances such as a Psychologist, Occupational Therapist, Social Worker, or Mental Health Nurse.

Specialist Support Coordination is expected to address complex barriers impacting a participant's ability to implement their plan and access appropriate supports. Specialist Support Coordinators assist participants to reduce complexity in their support environment and overcome barriers to connecting with broader systems of supports as well as funded supports.

Specialist Support Coordinators are expected to negotiate appropriate support solutions with multiple stakeholders and seek to achieve well-coordinated plan implementation. They will assist stakeholders with resolving points of crisis for participants, assist to ensure consistent delivery of service and access to relevant supports during crisis situations.

Specialist Support Coordination is generally delivered through an intensive and time-limited period necessitated by the participant's immediate and significant barriers to Plan implementation. Depending on individual circumstances, a Specialist Support Coordinator may also design a complex service plan that focusses on how all the stakeholders in a participant's life will interact to resolve barriers and promote appropriate Plan implementation. Once developed, a Specialist Support Coordinator will continue to monitor the Plan, but it may be maintained by one of the participant's support workers or other care supports.

Specialist Support Coordination includes, but is not limited to:

- Understanding the Plan;
- Connection with Supports and Services;
- Designing Support Approaches;
- Establishing Supports;
- Coaching, Refining, Reflection;
- Targeted Support Coordination;
- Crisis: Planning, Prevention, Mitigation and Action;
- Addressing Complex Barriers;
- Designing a Complex Service Plan;
- Building Capacity and Resilience; and
- Reporting to the NDIA.

For more information on Specialist Support Coordination please see the [NDIS LWB 5330 Specialist Support Coordination – Quick Reference Guide](#).

## Context and History

### **The establishment and key features of the National Disability Insurance Scheme (NDIS)**

The National Disability Insurance Scheme is the most significant attempt at social reform since the introduction of Medicare. It is important for Support Coordinators to understand the Scheme, its underpinnings and context.

By ensuring people with disability, and those who provide informal supports (family, friends, and social networks), receive full access to the support they need, the National Disability Insurance Scheme is dedicated to the vision of a community that values people with disabilities. The NDIS promotes the concept of an ordinary life for people with disabilities. This means the Scheme aims to provide people with disability the same opportunities as others in the community of the same age and stage of life.

Please take the time to become familiar with the information on the NDIS via the [NDIS website](#).

## Entering and understanding the Scheme

Support Coordinators are expected to have a high-level understanding of the NDIS, how to access the Scheme, and what the Scheme does and does not offer.

Access to the NDIS is determined by three separate and distinct requirements:

- Age - participants must be under 65 years of age when they first access the Scheme
- Residency - participants must live in Australia and be an Australian citizen
- Disability - participants must have a permanent or significant disability or meet early intervention requirements

Once a person in the scheme reaches 65 years of age, they can generally opt to stay in the NDIS. However, if they decide to exit and access supports for older Australians, they cannot return.

While there is a list of disability types that allow a person immediate eligibility for the NDIS, NDIS funding is not generally based just on the individual's type of disability. A person needs to have a disability that causes significant functional impairment and is likely to be lifelong. It may also be episodic in nature, such as a [psychosocial disability](#). The impact of the disability on the person's life is what the NDIA base their decisions on when assessing what supports are reasonable and necessary.

## The National Disability Insurance Agency (NDIA)

The NDIA administers the Scheme and makes decisions about whether someone is eligible to become a NDIS participant and, if so, how much funding they will receive. This is based on legislation - the [NDIS Act 2013](#), which sets out what supports and services are considered reasonable and necessary for the NDIS to fund. The main functions of the NDIA include:

- delivering the National Disability Insurance Scheme (NDIS) to support the independence and social and economic participation of people with disability and enable people with disability to exercise choice and control in the pursuit of their goals and the planning and delivery of their supports
- managing, advising, and reporting on, the financial sustainability of the NDIS
- developing and enhancing the disability sector
- building community awareness of disabilities and the social contributors to disabilities
- collecting, analysing, and exchanging data about disabilities and the supports for people with disability; and
- undertaking research relating to disabilities, the supports for people with disability and the social contributors to disabilities.

## The NDIS Quality and Safeguards Commission (NDISC)

The NDISC is an independent agency established to improve the quality and safety of NDIS supports and services. The NDISC regulates NDIS providers ensuring national consistency, promoting safety and quality of services, resolving problems, and identifying areas for improvement.

Under the NDIS, the requirements for NDIS providers are to be nationally consistent, proportionate to the size and scale of organisations and breaches, and responsive to an expanding market.

Requirements include:

- a national provider registration system
- NDIS Practice Standards
- NDIS Code of Conduct
- a national worker screening system
- a complaints management and resolution system
- incident management requirements, including reportable incidents
- providing opportunities for workers to complete the Worker Orientation Module
- behaviour support requirements, to reduce and eliminate restrictive practices.

The NDIS Commission is now operating in all states and territories.

### **The NDIS Act 2013 and other relevant Legislation, rules and policies**

In March 2013, the NDIS Act 2013 and the National Disability Insurance Scheme was created after National Disability Insurance Scheme Legislation was passed.

The National Disability Insurance Agency (the NDIA) was then established to manage the scheme's implementation. The NDIA can be found located in regional offices around Australia and are the only authority who can approve funding in participant's plans.

The NDIS Rules provide further necessary details for working within the NDIS.

It is recommended that LWB Support Coordinators become familiar with the following:

[National Disability Insurance Scheme \(Code of Conduct\) Rules 2018](#)

[National Disability Insurance Scheme \(Provider Registration and Practice Standards\) Rules 2018](#)

[National Disability Insurance Scheme \(Restrictive Practices and Behaviour Support\) Rules 2018](#)

[National Disability Insurance Scheme \(Specialist Disability Accommodation Conditions\) Rules 2018](#)

[National Disability Insurance Scheme NDIS \(Quality and Safeguards Commission and Other Measures\) Transitional Rules 2018](#)

[National Disability Insurance Scheme \(Incident Management and Reportable Incidents\) Rules 2018](#)

[National Disability Insurance Scheme \(Complaints Management and Resolution\) Rules 2018](#)

[National Disability Insurance Scheme \(Provider Definition\) Rule 2018](#)



[National Disability Insurance Scheme \(Protection and Disclosure of Information - Commissioner\) Rules 2018](#)

[National Disability Insurance Scheme \(Practice Standards – Worker Screening\) Rules 2018](#)

A summary of the NDIS Rules and additional NDIS related Guidelines can also be found on the [NDISC's website](#).

## What does the NDIS fund participants and how?

### Reasonable and necessary

Understanding what is 'reasonable and necessary' is crucial to the role of a Support Coordinator.

The NDIS funds [reasonable and necessary supports](#) only. These supports and services may include, education, employment, social participation, independence, living arrangements and health and wellbeing. To be considered reasonable and necessary, a support or service must:

- be related to a participant's disability
- not include day to day living costs not related to the participant's disability support needs, such as groceries
- represent value for money
- be likely to be effective and work for the participant and
- consider support given to the participant by other government services, family, carers, networks, and the community.

A participant's 'Reasonable and Necessary' supports consider any informal supports already available to them (including informal arrangements that are part of family life or natural connections with friends and community services) as well as other formal supports, such as health and education. These supports will help participants to:

- pursue their goals, objectives and aspirations
- increase their independence
- increase community and workplace participation, and
- develop their capacity to actively take part in the community

The NDIA makes decisions on what is 'Reasonable and Necessary' based on the [NDIS Act 2013](#) and other relevant [Operational Guidelines](#).

The [NDIS LWB 5312 Support Coordination - Reasonable and Necessary Support Checklist](#) is designed to assist Support Coordinators and clients to understand what is considered 'Reasonable and Necessary'. When using the checklist, run through the questions and answer 'Yes' or 'No'. In the case where all answers are 'Yes', it is more likely that this support will be viewed as Reasonable and Necessary by the NDIA, and the NDIA may

provide funding to the client for it. Where answers include a 'No' response, the support listed will not be considered Reasonable and Necessary by the NDIA.

**Note:** *It is important that Support Coordinators clearly understand these criteria in order to assist and explain to clients and their networks why some funding requests may not be covered e.g. rent payments, day to day living costs.*

## NDIS Supports

The NDIA sets price limits for some supports to ensure they provide value for money for participants. The [NDIS Price Guide](#) describes the scheme's funded supports broken down by purpose. There are 3 purpose areas – Core, Capital and Capacity Building. Each purpose area is further broken down into Outcome Domains which then link to Support Categories.

PURPOSE	OUTCOME DOMAIN	SUPPORT CATEGORY
CORE	Daily Living	01 Assistance with Daily Life
	Daily Living	02 Transport
	Daily Living	03 Consumables
	Social and Community Participation	04 Assistance with Social, Economic and Community Participation
	Work	04 Assistance with Social, Economic and Community Participation
CAPITAL	Daily Living	05 Assistive Technology
	Home	06 Home Modifications and Specialised Disability Accommodation (SDA)
CAPACITY BUILDING	Choice and Control	07 Support Coordination
	Home	08 Improved Living Arrangements
	Social and Community Participation	09 Increased Social and Community Participation
	Work	10 Finding and Keeping a Job
	Relationships	11 Improved Relationships
	Health and Wellbeing	12 Improved Health and Wellbeing
	Lifelong Learning	13 Improved Learning
	Choice and Control	14 Improved Life Choices
	Daily Living	15 Improved Daily Living Skills

Each Support Category is further broken down into Support Items. Providers claim up to the price limit set against the support item. Support items are grouped into 36 Registration Groups.

NDIS funding is expected to meet broad outcomes (outlined in the table above), as relevant to the funding and individual. Given these broad outcomes, the role of the NDIA planner is to encourage people with disability to identify their individual goals in order to then develop their NDIS plan. The NDIS expects that through the supports it offers and funds, there will be improved outcomes for NDIS Participants.

## The NDIS Pricing Arrangements and Limits Guide

The [NDIS Pricing Arrangements and Limits Guide](#) provides information for providers and participants regarding how the NDIS will fund supports (e.g. price limits), the expectations associated with the delivery of NDIS supports and the rules for flexibility of funds. Additional pricing rules are also included such as:

- provider travel



- participant transport
- cancellation fees
- establishment fees
- buddy shifts etc.

The NDIS Price Guide sets out the price limits and associated pricing arrangements. The guide is designed to assist participants and disability support providers, both current and prospective, to understand the way that price controls for supports and services work in the NDIS. The price limits set out are the maximum prices that Registered Providers can charge NDIS participants for specific supports. There is no requirement for providers to charge at the maximum price for a given support or service. Participants and providers are free to negotiate lower prices. LWB charges maximum price limits as they are applicable.

The price limits and other arrangements outlined in the price guide must be followed when supports are delivered to NDIS participants for a support that is either agency-managed or plan-managed. A provider of supports to a participant with an agency-managed plan (or of a support that is agency managed) must:

- be a Registered Provider with the NDIS;
- declare relevant prices to participants before delivering a service, including any notice periods or cancellation terms; and
- adhere to the arrangements prescribed in the Price Guide, including ensuring that their prices do not exceed the price limits.

Registered providers must not add any other charge to the cost of the supports they provide to any participant, such as credit card surcharges, or any additional fees including any 'gap' fees, late payment fees or cancellation fees, unless otherwise permitted by the Price Guide.

Self-managed participants can use registered or unregistered providers and are not subject to the pricing arrangements in the Price Guide

Support Coordinator's need to become especially familiar with the current [Price Guide and Support Catalogues](#). Additionally, *they need to ensure they are aware of any changes to these primary sources of information when they occur*, to have the most current information to share with clients.

Support Coordinators need to be aware that the NDIA publishes separate price guides for:

[Assistive Technology](#)

[Specialist Disability Accommodation](#)

### **Types of Price Regulation**

Supports can be subject to price regulation in different ways:

- Price controlled supports should only be claimed by a provider from a participant's plan when they are reasonable and necessary to meet a participant's needs and are subject to the conditions set out in the Price Guide.

- Quotable supports should only be claimed by a provider from a participant’s plan if the support is specifically included in the participant’s plan. They are also subject to the conditions set out in the Price Guide.
- Some supports are not subject to price control. These supports should only be claimed by a provider from a participant’s plan when they are reasonable and necessary to meet a participant’s needs. They are subject to the other conditions set out in the Price Guide

The Price Guide should be read in conjunction with the associated Support Catalogue.

When drafting policy documents, consider how accessible the content is for people with disabilities. Further information is available from this [Microsoft accessibility guide](#).

## The Support Catalogue

The Support Catalogue provides a comprehensive list of all supports funded by the NDIS and includes:

- item descriptors to assist providers to claim payments using a 'best-fit' approach, and to assist participants in engaging and negotiating with service providers
- the price limits of those support items that are subject to price limits

Generally, support items subject to price controls have a single national price limit.

However, some have two price limits – see below for how they are grouped:

Price Limit Group 1	Price Limit Group 2
<ul style="list-style-type: none"> <li>• New South Wales</li> <li>• Victoria</li> <li>• Queensland</li> <li>• Australian Capital Territory</li> </ul>	<ul style="list-style-type: none"> <li>• South Australia</li> <li>• Western Australia</li> <li>• Tasmania</li> <li>• Northern Territory</li> </ul>

The Support Catalogue outlines where these differences apply.

### Support Items

Each support category includes specific supports and services that are recognised in the NDIS payment system. These are referred to as 'support items' and are, in most cases, not prescribed in participant plans. Each support item has a unique reference number. For example:

#### 01\_013\_0107\_1\_1 - Assistance with Self-Care Activities - Standard - Saturday

Support Category	Sequence Number	Registration Group	Outcome Domain	Support Purpose
01	013	0107	1	1

Support Coordinators must have the most current NDIS Price Guide and Support Catalogue at hand as their guide in determining what each reference number refers to.

**Support Purpose and Flexibility**

Plans are deliberately written to offer maximum flexibility and can be reviewed, particularly if circumstances change. NDIS Plan budgets are allocated to three separate support purposes. The below table summarizes the types of NDIS Supports and the flexibility of funding by Support purpose:

Support Purpose	Example Supports	Flexibility of Funds
<b>Core</b>	Personal care, community activities, consumables and transport	Flexible across all the areas where funding is allocated. *Transport funding is not always flexible.
<b>Capital</b>	Equipment, technology, modifications	Not flexible and generally requires a quote
<b>Capacity Building</b>	Skills building, training, employment, support coordination, therapies	Generally flexible within each subcategory

For more detailed information on how these NDIS Plan budgets can be used, visit the [NDIS Website](#).

**N.B.** NDIS funds are not flexible if the support item is “stated” in the NDIS plan. Stated supports can only be used to purchase supports specifically identified in the plan. Supports can be made Stated if the NDIA identifies it is essential in ensuring that a participant achieves a specific outcome, for example, where an item of equipment or an assessment may be vital to the achievement of the participant’s goals.

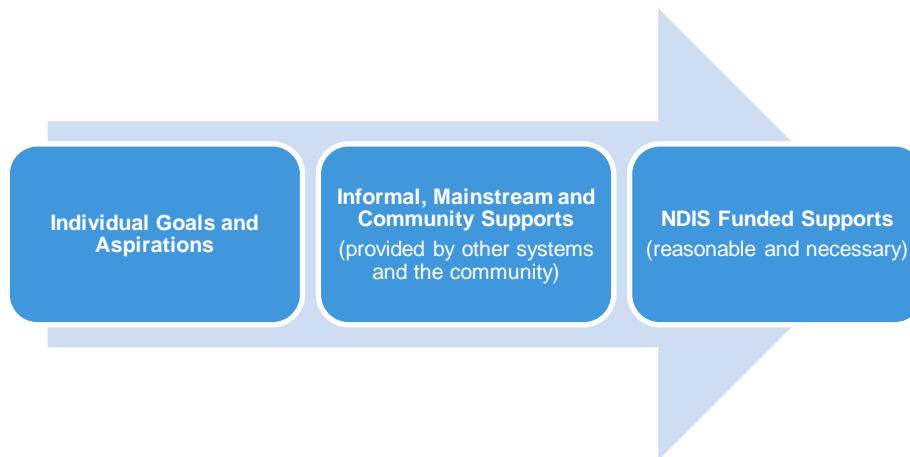
**NDIS Participant Plans**

A participant will have their plan developed by a planner from either the NDIS Partners in the Community (Local Area Coordinator (LAC)) or Early Childhood Early Intervention (ECEI) or the NDIA. This occurs during a planning conversation, also referred to as a pre-planning or planning meeting. Allocation of funds is the responsibility of an NDIA delegate, regardless of whether the planning meeting occurred with the LAC or the NDIA. The LAC does not set or approve the funding value.

A participant will receive funding in their NDIS plan across the relevant support categories depending on the goals they have identified during their NDIS planning meeting and the NDIS Reasonable and Necessary funding criteria. A participant may choose to have their funds managed by a Plan Manager, by the National Disability Insurance Agency (NDIA) or they may request to self-manage these funds. A participant may also choose to use a mixture of these fund management options. Plan Funding - Management options are summarised below:

Management Option	How will Supports be Paid	Type of provider the participant can engage and their price limit
Agency (NDIA) Managed	Providers will submit a payment request via myplace provider portal	Registered provider only, with price limit set by the NDIS Price Guide
Self - Managed	Providers will invoice the participant directly for supports delivered	Registered provider with price limits set by the NDIS Price Guide and/or unregistered providers with no price restrictions
Plan - Managed	Providers prepare an invoice to be sent to the Plan Manager. The Plan Manager claims from the NDIA and then pays the provider	A participant who is plan-managed can purchase supports from both registered and unregistered providers. Because plan-managers are registered providers they can only claim up to price limits set by the NDIS Price Guide.

An NDIS plan may also include every day or mainstream supports that will assist the person to reach their goals so that, in the future, they may not require funding from the NDIS. These types of supports may include friends, social groups or clubs, and mainstream supports such as Centrelink etc. An NDIS plan will generally run for 12 months (but can be up to 2 years) and will list various supports the person is funded for under the Scheme.



## Key Roles supporting clients in the NDIS

### NDIA Planners:

- Conduct planning conversations with participants and build the Plan.
- Make reasonable and necessary decisions in accordance with the [NDIS Act 2013](#); approve plans, including those worked on by Local Area Coordinators (LACs).
- Do not support participants to implement their plans.

Key questions asked of the client by the NDIA planner include:

- The participant’s personal details

- Details of the participant's current community and mainstream supports
- How the participant manages everyday activities and their safety.

**Local Area Coordinators (LACs):**

LACs are employees of NGOs who are contracted by the NDIA to deliver services as follows:

- Conduct the planning conversation process for participants categorised as general, supported and some cases, intensive or complex, on behalf of NDIA.
- Do not make reasonable and necessary decisions in accordance with the [NDIS Act 2013](#), do not approve plans.
- Support participants to implement and review their plans where this support is very minimal.

**Plan Managers:**

A Plan Manager can help with the financial tasks required to be completed as part of the NDIS Plan. They are also paid separately in the NDIS plan and their responsibilities may include:

- organising providers and their payments,
- processing of claims and invoices
- tracking of budgets
- liaising with providers
- troubleshooting issues relating to finances

Any agency delivering this service must be an NDIS registered provider of plan management. NDIS Participants whose plans include plan managed funding may access services from providers who are not registered providers.

When a participant's funding is plan managed, providers should issue invoices to the participant's plan manager. The [NDIS LWB 5313 Support Coordination - Invoice Guidelines for Plan Managed Clients](#) template can be used to provide invoicing guidance to a client's non-registered provider.

## The Role of a Support Coordinator

A Support Coordinator's role is to assist the individual to implement their plan and build their capacity to understand their NDIS Supports, the Price Guide and Support Catalogue and find services and supports in their local community. For those support items that require a quote, Support Coordinators may be required to assist the client to obtain and select from several provider quotes.

Support Coordination must be delivered by NDIS registered providers.

There are 3 levels of Support Coordination

1. Support Connection
2. Coordination of Supports
3. Specialist Support Coordination

The three levels of Support Coordination fall within two registration groups:

- Support Coordination – Specialised Support Coordination
- Assist-Life Stage, Transition – Support Connection and Coordination of Supports

LWB is registered under NDIS for Assist-Life Stage, Transition – Support Connection and Support Coordination and provides delivery of Support Coordination across all states and territories of Australia.

### Qualifications and experience required

LWB has two nationally endorsed Position Descriptions for those undertaking this work, Support Coordinator and Specialist Support Coordinator that can be accessed via LWB’s [Position Description Library](#).

Support Coordinators should be employed as per the required skills, experience, and responsibilities described within the Position Descriptions to ensure consistent delivery of Support Coordination. LWB must also demonstrate to the NDIA that NDIS clients are safeguarded and Support Coordination services are provided separately from any other LWB NDIS funded supports.

Type of Support Coordination	Qualifications Required	Experience Required
<b>Level 1 – Support Connection</b>	Disability Support Worker level qualifications or equivalent including:	At least 2 years of experience
<b>Level 2 – Coordination of Supports</b>	<ul style="list-style-type: none"> <li>• Diploma in Disability</li> <li>• Certificate III or IV in Disability</li> <li>• Certificate III or IV in Mental Health</li> </ul>	
<b>Level 3 – Specialist Support Coordination</b>	Allied Health Qualifications e.g.: <ul style="list-style-type: none"> <li>• Social Work</li> <li>• Psychology</li> <li>• Occupational Therapist</li> <li>• Mental Health Nurse</li> </ul>	Demonstrated Experience

## Support Coordination provided by LWB

Support Coordinators are expected to assist LWB clients with the below tasks, however, what Support Coordinators do with clients will be determined by how much Support Coordination funding the person has in their NDIS plan and what they want to achieve with this funding:



**What is in scope for Support Coordination**

- Coordinating a range of both funded and mainstream supports
- Building Informal Supports
- Helping clients to understand their NDIS plan
- Identifying and connecting clients to service providers
- Liaising with providers, explaining the client's unique goals, needs and preferences
- Helping clients understand Service Agreements
- Complete and check Service Bookings are correct
- Resolving points of crisis
- Connect clients to advocacy services if required
- Work to build the client's capacity regarding the above
- Monitor and manager conflicts of interest
- Support the client's informal supports to be involved in connecting to services
- Monitor and use budgets flexibly
- Submitting reports to the NDIA to prepare for clients plan reviews
- Report on how receiving funded Support Coordination has built the client's capacity, however incrementally, and provide justification of support delivered and/or support required going forward

Best Practice for Support Coordinators would also include:

- Actively design practice with clients
- Build client capacity with tools and resources clients can keep
- Link to informal, mainstream and community supports
- Understand the NDIS inside out, and effectively support participants to do the same
- Engage clients and promote choice and control
- Build confidence in the participant and their support network
- Remain independent by providing clear and transparent information

**What is out of scope for Support Coordination**

- A Transport service - support should focus on finding alternative means of transport such as public transport, taxi, Uber etc. Clients may have separate Transport funding in their NDIS plan.
- Choosing Services on behalf of the client
- Signing Service Agreements on behalf of the client
- Collecting or paying invoices on behalf of the client
- Managing the client's paperwork associated with their supports
- Developing Support Plans on behalf of the client e.g. Provider's SIL related Support Plans

- A permanent requirement – this is assisted by focussing on supporting the client’s independence rather than reliance
- Advocacy – if advocacy is required, the client should be connected to formal advocacy supports
- Provision of personal care, community access or other direct supports
- Accompanying a client to funded or unfunded supports
- Plan Management – encourage the client to seek support through the NDIA if they require plan management
- Case Management – encourage the person to do as much for themselves as possible and strengthen their capacity
- 24/7 on-call service. While Support Coordinators may work to build the client’s capacity to respond to emergencies or critical events, Support Coordinators do not deal with out of hours requests. Support the client to become aware of other emergency supports such as the mental health crisis line, and how to contact those services. Refer the client to their NDIS LWB 5321 Support Coordination – My Support Team for details of who can assist them.
- A pathway to attract more NDIS clients to use LWB provided services
- Duplication of Early Intervention Supports. It is unlikely referrals for children under 6 will be received as there are specially funded supports to help parents of young children with disability.

### **Client Expectations of Support Coordination**

- **Generally**, clients can expect that LWB Support Coordination will:
  - be delivered with dignity, respect, honesty and courtesy
  - offer as many opportunities as possible for full client participation and decision making
  - develop and maintain appropriate interpersonal behaviours and communication skills
  - give accurate, consistent, timely and clear information about a range of providers, formal, informal and mainstream supports
  - ensure the support provided maximises opportunities for as much community based and social participation for each client as possible
  - link the client to universal services
  - retain positive relationships with family and friends
  - maintain the privacy and confidentiality of personal information
  - respect diversity of culture, religion, values and sexual orientation
  - be delivered by appropriately experienced and qualified staff
- **Specifically**, clients can expect LWB Support Coordination to be delivered in a way that ensures:
  - LWB employs staff who have the appropriate experience and qualifications

- LWB is knowledgeable about the NDIA processes such as the Participant Portal, Service Bookings and Service Agreements
- their plan budget is met and there is no overspend
- they will be made fully aware of any potential conflict of interest when purchasing other supports offered by LWB
- they are supported to firstly access mainstream or community-based supports where available rather than using funding to purchase supports that others in the community can freely access
- LWB will build their capacity and confidence to self-manage part of or all their Support Coordination
- LWB are responsive to their changing needs and that Supports are coordinated flexibly and tailored to the client's needs.

## Delivery of Support Coordination

In delivering Support Coordination, LWB Support Coordinators will rely heavily on a variety of support tools and resources to ensure services are tailored and delivered to the needs of each client.

Support Coordinators can access information and Practice Tools specific to their role by accessing the Support Coordination page within the LWB Disability Pathway Signature Process.

An initial meeting will need to occur to develop an understanding of the client's needs. If the meeting is to occur at the client's residence, the [NDIS LWB 5317 Support Coordination - Client Home Visit - Risk Assessment](#) should be completed with the client before the visit.

### Support Connection

**Level 1** - Support Connection is most often delivered by Local Area Coordinators (LAC) but can also appear within a client's plan. **Support Connection** is generally funded for minimal hours over the life of an NDIS plan. Support provided is low-level support, focused on building the client's capacity to connect with all forms of supports to enable them to get the most out of their plan and meet their goals. The Support Coordinator aims to enable the client to increase their capacity over time, gain confidence and skills to self-coordinate their NDIS package.

### Coordination of Supports

**Level 2** – Coordination of Supports assists in building a client's skills to understand, put into place and make the most of their NDIS Plan. Multiple supports may be sought to increase the capacity of the client to make and maintain relationships, manage service delivery tasks - such phoning a provider if there is a need to change support times and to increase the client's independence and inclusion into their community.

The hours allocated to Coordination of Support may vary but are generally more than Level 1 and as such the expectations of the involvement of the Support Coordinator are higher.

The Support Coordinator should aim to enable the client to increase their capacity over time to manage at the lower level Support Connection assistance.

A Support Coordinator providing Coordination of Support will work with clients of varying needs which may include supporting clients:

- with multiple issues in their life
- who are young people in residential aged care
- with behavioural concerns that are limiting their involvement in life
- who are highly vulnerable or with significant disadvantage
- who have a poorly resourced family
- who are homeless
- who have challenging history with services
- residing in the child protection or criminal justice system
- who want to end relationships with providers
- with degenerative conditions

### **Specialist Support Coordinator**

**Level 3** – Specialist Support Coordinator includes tasks associated in Levels 1 and 2 but includes the development of strategies and plans, such as Behaviour Support Plans, to assist the client to engage with direct supports.

Level 3 is expected to be delivered by those staff with Allied Health qualifications and experience, be time-limited, and ensure the client can manage with assistance offered through the lower level - Coordination of Supports. There is no real guidance on the number of hours offered for this type of support.

For detailed information about the role of Specialist Support Coordinator and where the interface between Level 2 Support Coordination might occur, refer to the [NDIS LWB 5330 Specialist Support Coordination – Quick Reference Guide](#).

## **Supporting Clients to navigate the NDIS**

Support Coordinators need to build the capacity of their clients to understand and navigate the NDIS and its operational processes. The NDIS has a great range of fact sheets for participants which are also available in an accessible format.

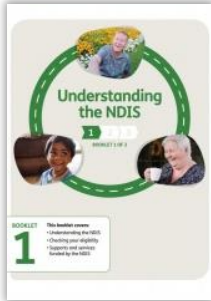
### **Understanding the NDIS Booklets**

The below booklets explain a number of complex topics in an easy to understand language and should be used by Support Coordinators to assist clients and their networks to better understand the NDIS, how the planning process works and how clients can utilise their plans.

The documents can be accessed [here](#) and contain information for NDIS participants on:

- Getting started with the NDIS
- Signing a service agreement
- Transport

- Information for those with psychosocial disability
  - **Booklet 1 - Understanding the NDIS**



[Booklet 1 - Understanding the NDIS: Download PDF](#)

[Booklet 1 - Understanding the NDIS: Download DOCX](#)

[Download Booklet 1 - Understanding the NDIS: Easy English PDF](#)

- **Booklet 2 - Planning**

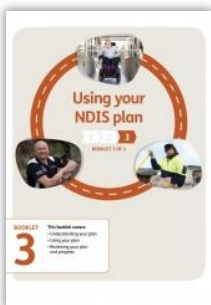


[Booklet 2 - Planning: Download PDF](#)

[Booklet 2 - Planning: Download DOCX](#)

[Download Booklet 2 - Planning: Easy English PDF](#)

- **Booklet 3 - Using your NDIS plan**



[Booklet 3 - Using your NDIS plan: Download PDF](#)

[Booklet 3 - Using your NDIS plan: Download DOCX](#)

[Download Booklet 3 - Using your NDIS plan: Easy English PDF](#)

The NDIS also has several factsheets available to participants to enhance their understanding of, and how to navigate, the NDIS. These factsheets can be accessed [here](#) and include:

- About the NDIS
- Accessing the NDIS
- Developing your NDIS Plan
- Getting ready for your planning conversation

- Starting your plan
- Early Childhood and Intervention
- Supporting Families
- Connecting with Mainstream

## **myplace - The NDIS Portals**

The NDIS portals designed for Providers and Participants to access are called 'myplace'.

Access to the 'myplace' portal is available via the NDIS website.

There are 2 Portal options:

- [myplace Provider portal](#)
- [myplace Participant portal](#)

### **myplace Provider Portal**

- The NDIS Provider portal is a secure website developed for providers to manage their transactions with the NDIA, and view and manage their services with Participants. Providers can access the portal to make and view Service Bookings, Requests for Service, Provider finder information and various other options.
- Support Coordinators will need to be registered with PRODA to be able to access this portal. Contact the Disability Staff Support Centre (DSSC) on 1800 316 660 or email [NDISQs@lwb.org.au](mailto:NDISQs@lwb.org.au) to set up your PRODA Registration.

### **myplace Participant Portal**

- Support Coordinator's need to be familiar with accessing and understanding the function of the Participant Portal in order to assist NDIS clients to build their skills in self-managing their NDIS funding. myplace will provide NDIS participants with a range of information, including a list of Providers in their area, ability to view their current and previous Plans and access to other resources.
- Building a client's capacity to navigate their myplace portal is a key role of a Support Coordinator. An effective Support Coordinator works alongside the client at all times, learning with, coaching and mentoring so the client becomes more self-reliant and the knowledge sits with the client rather than the Coordinator.

### **Accessing a client's NDIS plan**

NDIS participants do not have to show a provider their NDIS plan. However, most providers will seek access from the participant to their plan information on the portal or will ask for a copy of their NDIS plan or the part of the plan that is relevant to that provider. This ensures that the NDIS participant has enough funding for what they are requesting.

The Participant Portal allows a client to share the basic details of their plan with the providers with whom they have an active service booking. They can only do this if they are set up to access the Participant portal on the NDIS website.



If the client, or nominated other, does not yet have access to the NDIS My Place Participant Portal they can request their plan be shared by emailing: [enquiries@ndis.gov.au](mailto:enquiries@ndis.gov.au).

Completing either of these options means that Support Coordinators have visibility of the client's plan and expenditure.

NDIS Participants can share the parts of their plan titled **About Me** and **My Supports** as well as the **NDIS budget and basic plan details**. Access to the My Supports section of the plan is extremely important in supporting a participant to coordinate their mainstream, informal, community and paid supports which is a core function of the role of Support Coordination. This functionality improves the ability of Support Coordinators to build participants' capacity to manage their budgets.

It's important to remember that this function facilitates the participant's right to choose whether they share their plan, and providers **cannot require** participants to give access to this highly personal information. Participants may choose to share their information with some providers and not others.

**LWB asks that as standard Support Coordination practice, all NDIS Support Coordination clients share with us (at a minimum), My Supports, their NDIS budget and details of their plan.**

**N.B.** If the client is only willing to share the minimum information, it negates the need to seek consent from the client to talk to the NDIA about the plan details. The NDIA will only provide Support Coordinators information about an NDIS Participant if they are registered to act for LWB on the NDIS Portal. Registering is a relatively simple process and for assistance and details to undertake this, please email the DSSC on [NDISQs@lwb.org.au](mailto:NDISQs@lwb.org.au).

## **Understanding Service Agreements**

Service Agreements provide participants and registered providers with a written agreement about the expected outcomes, the nature, quality and price of supports to be provided along with any agreed terms and conditions.

Making a Service Agreement is a negotiation between the participant and the provider. Participants might involve a nominated person e.g. formally delegated Plan Nominee (such as a participant's family member or friend).

A Service Agreement needs to be provided to the participant in their preferred form of communication, and copies of the Agreement provided to the client's Authorised Decision Maker (where they have one).

Irrespective of the Provider, Service Agreements must comply with Australian Consumer Law. In this context, the Service Agreement is a contract and applies in the same way a contract for the delivery of any commercial service does. A Service Agreement should provide the client with information (where relevant) about:

- an agreed-upon quote for the requested supports
- a request for consent to make a service booking against the client's funds
- a set of terms and conditions relating to the delivery of supports for both provider and participant.

- Participant Transport
- Provider Travel
- billing for non-face-to-face supports
- billing for report writing
- cancellations
- ability to re-negotiate prices if changes occur to NDIS price limits within the agreement's period
- ability to renegotiate or terminate agreements if incomplete information about the participant's needs are disclosed
- payment method and frequency, depending on funds management
- provision of supports when there is a gap between plans at the point of scheduled review
- any matter requiring participant consent e.g. sharing information with providers of other NDIS supports

Support coordinators will have extensive exposure to Service Agreements. A Support Coordinator should support, mentor and coach each NDIS client by clearly reading through and explaining their Service Agreement(s) with all providers they have selected and support them to question anything that may be unfair or unreasonable.

**Note:** Support Coordinators have a responsibility to increase each client's capacity (capacity building) to understand what should be included within a Service Agreement.

Key points for Support Coordinators and Service Agreements:

- build client's understanding of what to expect from providers and to advocate for themselves.
- support the client to work through and enter into Service Agreements with providers themselves (or with an advocate) rather than having a substitute decision-maker.
- Support Coordinators do not have authority to sign Service Agreements (but can review)

LWB require a completed [NDIS LWB 412 Service Agreement](#) with a client before the delivery of any Support Coordination services. Expectations of NDIS clients in receipt of LWB supports and vice versa, including those of LWB delivered Support Coordination, can be found within the LWB Service Agreement and should be explained to the client.

**Note:** LWB provides an [Easy English](#) version of our Service Agreement which assists the client to have more involvement and control where possible in the process. Where it would be helpful to the client, Support Coordinators should seek Easy English versions of Service Agreements from other providers.

A client may require alternative communication options in addition to Easy English to assist them to understand the contents of a Service Agreement. This may include translation and interpreting services, or the use of Augmentative Communication Systems such as signing, symbols or word boards.

LWB Support Coordinators should take time to familiarise themselves with the [NDIS LWB 5301 Support Coordination – Procedure](#) and the [Engagement](#) stage of the Disability Pathway Signature Process.

For more information on Service Agreements please access the following links:

[NDIS Website: Service Agreements](#)

[Disability Services Consulting: Everything you need to know about Service Agreements](#)

[NDS: Practical Guidance to Operating in the NDIS](#)

## Supported Decision making

It is vital that the client receiving Support Coordination feels that, as much as possible, they are in control of decision making in all areas that affects their life. 'Supported Decision Making' is when a client gets support to make or act on their own decisions. NDIS participants may seek support from a range of sources when needing to make and implement a decision. This could include their Support Network, i.e. family and friends, professionals or advocates.

At times it may be necessary to formally authorise another person to make decisions on behalf of the NDIS participant. In this situation, the NDIA can appoint a **Plan Nominee**.

When supporting clients to make decisions relating to their plans, the Support Coordinator should ensure the communication needs of the client are understood and any augmentative communication systems are used. Both the NDIS and LWB Websites are fully audio available and translatable into several community languages. Feedback on LWB client resources including if it is difficult to understand or access should be provided do the DSSC at [NDISCQs@lwb.org.au](mailto:NDISCQs@lwb.org.au) for further review.

Plan Nominees are only able to assist in decisions relating to the person's NDIA plan. The NDIA has a specific process to follow if a person is requesting to have someone allocated as their Plan Nominee. Support Coordinators are required to identify when people might benefit from having a Plan Nominee and the process for supporting the client to obtain one.

**Note:** *Support Coordinators should make themselves aware of whether the client has or may require a Plan Nominee at the commencement of the working relationship.*

For other people, the appointment of a formal decision-making support via an Authorised Decision maker may be required. This may occur when a person has complex medical or behavioural issues or where the nature of their disability means they cannot be expected to make decisions such as the selection of providers.

Some NDIS clients may not have any formal or informal decision-making support but the Support Coordinator may feel concerned they do not fully understand the implications of signing Service Agreements. In those situations, it would be appropriate for the Support Coordinator to suggest the involvement of an independent advocacy service to support the client with decision making or guidance on seeking a formal decision-maker.

There are resources available to provide Support Coordinators further information regarding Supported Decision making:

[NDIS LWB 442 Plan Nominee - Practice Guidance](#)

[NDIS LWB 938 Capacity to Provide Consent - Assessment](#)

[Western Australia's Individualised Services - Support Decision Making](#)

## Building client’s capacity

Capacity Building is at the heart of all levels of Support Coordination. All activities provide an opportunity to strengthen the client’s capacity to make decisions for themselves, source their preferred supports and increase their confidence and understanding of the NDIS ‘world’ and how that can work for them in their own community.

Support Coordinators ‘**strengthen**’ and avoid **taking over or replacing** support.

The Support Coordinator role in capacity building may extend beyond the client and include supporting families and other providers, however, the priority is always working with the client’s capacity to meet their wishes.

LWB clients are likely to also access community or mainstream supports such as those provided by Health, Education, Justice, Housing, Child Protection, etc. in addition to their NDIS funded services. Support Coordinators need to have a comprehensive knowledge of supports and services available within their communities, establish and maintain key contacts in mainstream services, and have a clear understanding of what the NDIS will and will not fund. That is, what is included and excluded as ‘reasonable and necessary’, and what the NDIS expects of universal services to assist clients navigate potential options.

Disability Services Consulting states that a Support Coordinator’s role in capacity building includes the individual, their families, providers and the community.

### Support Coordination Building Capacity with...

#### The Individual (First Priority)

- define what good support means to them
- identify options and make choices
- coordinate supports, self-advocate and self-direct
- identify opportunities for capacity building in supports
- build confidence and resilience

#### Families

- build NDIS knowledge and confidence
- support the client within the family environment
- support them to give clients control where necessary
- support them to understand options and help the client choose

#### Providers

- grow the market
- influence them to improve quality of services
- identify how they can give more control to clients
- help them understand how to meet clients’ needs

**Community**

- identify new opportunities for inclusion
- to support community groups and members to understand how to break down barriers to access
- support a client in making individual connections within their community

*Remember, the client's choices and preferences should drive all work.*

LWB has provided various practice tools that may assist a Support Coordinator to build a client's capacity. These can be found at

## Managing Conflict of Interest

All NDIS providers must manage conflicts of interest. There are additional requirements for Support Coordinators, especially when their organisation provides other funded supports, as LWB does. Therefore, to manage the potential conflict of interest, LWB must have documentation that:

- details the organisational arrangements in place which keep information separate between teams
- demonstrates transparency about the participant's options for their coordination of supports
- confirms there is no remuneration provided to staff for participant volume
- confirms that there are no trailing commissions or percentages on funds managed
- confirms that the conflict of interest and the above information was disclosed to the participant

The role of the Support Coordinator does not include promoting, marketing or influencing clients (and/or their representatives) to choose LWB to deliver other services - through **any action or intention, whether perceived or actual. This means that LWB Support Coordinators should not be distributing other LWB product information.**

However, there may be instances when a client does want to consider using LWB for the delivery of other supports. In this situation, LWB must be able to produce evidence that demonstrates how it manages the conflict of interest e.g. if the client wants LWB to provide SIL or Lifestyle supports etc. in addition to Support Coordination.

### LWB manages this by:

- Implementing explicit policies in place to manage any conflicts, refer: [NDIS LWB 910 Managing Conflict of Interest - Policy Guidance](#).
- Ensuring different staff deliver Support Coordination to those who deliver direct supports, refer: [NDIS LWB 911 Managing Conflict of Interest - Procedure](#)

- Ensuring Support Coordinators maintain records that demonstrate potential or real conflicts, and these are managed appropriately for each client. LWB must, for example, have specific CIRTS records that show the options that have been discussed with the client. LWB must show that choice and control have been promoted irrespective of whether a client selects LWB as their provider of other supports, refer:
  - [NDIS and CIRTS - QRG](#)
  - [NDIS and OoHC - CIRTS QRG](#)
  - [NDIS Support Coordination and CIRTS - QRG](#)
- **LWB must** ensure the fact that LWB is a provider of other types of disability support, and there is **no expectation** on the client to select LWB for those supports, is explained to clients (and/or their representatives).
- LWB must explain that they will never influence a client to select LWB for further supports. Ideally, this discussion **should occur** before the Service Agreement is sighted, explained and signed. Support Coordinators may wish to develop some possible ‘scripts’ to assist in explaining this matter.

## Tracking time (billable hours)

Support Coordinators work within a ‘billable hours’ model to ensure the support provided to the client is fully funded.

**Billable hours** are the units of Support Coordinator’s work time that can be charged to a client. Clients should only be charged for time that the Support Coordinator is performing work tasks for them. This may include any of the below activities as outlined within the [NDIS LWB 5304 Support Coordination - Client Fact Sheet](#).

Activity	Expected purpose
Face to face meetings with the client	Understanding the client’s needs, goals and the funding available within their NDIS plan to support them reach those goals
Support clients to register and access the NDIS Participant Portal	Assist the client to become familiar with the NDIS Portal and to use it themselves or with minimal assistance from others
Face to face meetings with the client and other providers or services	Coordinating and putting supports in place
Phone calls and text messages to and from the <b>client</b>	Arranging meetings, seeking and understanding information related to the client’s supports



Phone calls and text messages to and from <b>others</b> , including the NDIA/LAC	Arranging meetings, seeking and understanding information related to the client's supports
Supporting the client at new activities	Assist the client to make connections when trying new activities so those connections can continue to support them. (Only to be provided short term).
Desk-top research of options	Researching options for the client, such as providers and their availability, as well as mainstream and community opportunities that have no cost to the client's NDIS plan.
Getting ready for plan review	To make sure the client gets the maximum support they require from their next NDIS plan, the Support Coordinator will set aside some hours to work with the client to review their current plan and prepare for their planning meeting. The LWB Support Coordinator may attend the Plan Review meeting if the client wishes.
Other	From time to time, there may be other activities not included in the above. The Support Coordinator will clearly explain those to the client.

Support Coordinators should use this document to explain to clients and their relevant networks what LWB will claim regarding support available through their Support Coordination product.

Support Coordinators need to be able to 'time manage' effectively in order to complete all necessary tasks within the allocation of Support Coordination hours in the client's NDIS Plan. When commencing the relationship with the client, the Support Coordinator should:

- explain the number of hours allocated for Support Coordination
- identify the client's goals and the priority for achieving those goals
- determine what the Support Coordinator will do and what the client will do in order to reach the stated goals and implement the plan within the available hours.

This can be captured in the [NDIS LWB 5311 Support Coordination – Client Goal Action Plan](#)

### Tracking of Support Coordination Hours

Support Coordination clients are allocated a set number of hours within their NDIS plan and LWB confirms the amount of Support Coordination to be delivered via the Service Agreement. LWB has developed a tracking tool specific to tracking the delivery of support

coordination hours to a client. Resources including the Tracker, Procedure and Quick Reference Guide are as follows:

- [NDIS LWB 603 Support Coordination Hours Tracker](#)
- [NDIS LWB 602 Support Coordination Hours Tracker - Procedure](#)
- [NDIS LWB 622 SACA Claiming - Quick Reference Guide](#)

Support Coordination hours are also entered into LWB's 'Service Agreement and Claiming App' (SACA) directly by the Support Coordinator. This will allow for Support Coordination hours to be claimed.

**Note:** LWB recommends that when tracking/recording time, time is recorded in increments of **no less than 5 minutes**. Support Coordinators need to exercise common sense when tracking their time. E.g. it may be more time-efficient if the Tracker tool or SACA is completed at the end of each day.

**TIP:** The NDIA estimate that approximately 30% of the total hours allocated for Support Coordination are required during the establishment of the relationship with the client. This should include planning what the Support Coordinator will do, as opposed to what the client will do themselves, and prioritising tasks to be able to work within the Support Coordination hours.

#### **Tracking hours is essential to ensure:**

- Support Coordinators can keep track the number of hours used
- The Support Coordination hours in the client's NDIS Plan and LWB Service Agreement are used in the most beneficial way for the client
- Accurate claiming is achieved by Finance teams
- Over-servicing is avoided, or potential over-servicing recognised, and actions taken to avoid this.
- Individual Support Coordinators track all tasks undertaken for each client and can provide information to clients/plan nominees or others to validate the delivery of these hours and tasks.

#### **Validation of hours being claimed**

As per the NDIS, providers of Support Coordination **are required** to provide clients (or their relevant others), evidence of work undertaken. This information needs to be provided regularly. The client, or their Authorised Decision Maker, and the Support Coordinator should discuss and confirm how often evidence is to be provided and in what format, at their first meeting.

Support Coordination Progress Notes are to be added to the client's CIRTS file and can be printed from CIRTS as validation evidence for the client or other. A brief note referencing a task/information may be added to SACA / Tracker but they should not replace the practice of saving Progress Notes in CIRTS. For more information, refer to the [NDIS LWB 602 Support Coordination Hours Tracker - Procedure](#).

SACA can be used to produce evidence of the hours worked where the Support Coordination Tracker has not been used and hours worked have been entered directly into SACA. The Support Coordinator can generate a spreadsheet by accessing the client's claims history. Once the Support Coordinator has accessed the client's claims history, they can sort the data by service date. The relevant data can be highlighted and then copied into a spreadsheet to be sent to the client.

**Documentation to be completed by the Support Coordinator**

An integral part of the role of the Support Coordinator is to ensure the necessary documentation is completed in a timely and professional manner. Documentation requirements are outlined within the Table of Contents of the [Support Coordination](#) pages found in the Disability Pathway. Support Coordinators can ensure they are meeting minimum documentation requirements by noting the nature of each document. The document will be identified as:

Nature	Documentation requirements
Mandatory	Must be completed for every client
Mandatory as applicable	Must only be completed for the client if relevant to the client's circumstances and support being provided.
Optional	A useful resource that is optional to use if it adds value or assists to provide / collect information.
Information	This is a reference / practice guide resource the Support Coordinator should be familiar with.

**Key Documentation includes (but is not limited to) the following:**

**NDIS LWB 403 Engagement Form**

Part of the onboarding process is for the Support Coordinator to gather relevant information relating to the client and their needs. The [NDIS LWB 403 Engagement Form](#) MUST be completed when a client commences support with LWB. A copy of the completed form should be sent to the client and uploaded to their CIRTS file.

The Support Coordinator can pre-populate the form using information from the Request for Service document prior to meeting with the client. If there is further information required that is not able to be taken from the RFS, the Support Coordinator should contact the client, collecting as much, or as little, information about the client as is needed or appropriate, given their plan.

**Note:** There are sections within the Engagement Form that are not relevant to the provision of Support Coordination i.e. Section 5, 6 and 8. The questions in these sections DO NOT need to be asked for the provision of Support Coordination alone.

**NDIS LWB 412 Service Agreement**

The [NDIS LWB 412 Service Agreement](#) is LWB's formal document (contract) that outlines what support a client is purchasing from LWB through their NDIS funding and/or paying for themselves, and the roles and responsibilities of both LWB and the client.

The Service Agreement should be developed using the information outlined in the RFS and the completed [NDIS LWB 403 Engagement Form](#), once the client has provided consent to the delivery of Support Coordination Services. If the client is receiving other LWB services, then the client's existing Service Agreement is to be updated with the Support Coordination hours.

Support Coordinators can access the [NDIS LWB 621 SACA Service Agreement - Quick Reference Guide](#) for instructions on how to develop Service Agreements.

**NDIS LWB 5303 Support Coordination - Client Action Plan**

Support Coordination clients have limited hours of Support Coordination in their Plan to assist them achieve their goals. Given this, it is vital that Support Coordinators establish a plan with the client that 'plots' out what they want to achieve and how this occurs within the hours provided.

The [NDIS LWB 5311 Support Coordination - Client Goal Action Plan](#) is developed in collaboration with each client at the initial or second meeting and should provide a clear structure of how the relationship will work to achieve the desired outcomes. Additionally, it provides a form of evidence that can inform Plan Review reports and/or Post-implementation reports.

This is a mandatory form and the LWB template must be used. Time spent with the client on this Action Plan can be claimed.

**Support Coordination – Post Implementation Report**

The Support Coordination – Post Implementation Report is completed on request of the NDIA as per the client's Request for Service (RFS). The report outlines the client's initial goals, expected outcomes and required supports (paid and unpaid) for their NDIS plan period as well as any identified barriers to NDIS plan implementation. Details on when these reports are to be completed by the Support Coordinator can be found in each client's RFS and should be emailed to [enquiries@ndis.gov.au](mailto:enquiries@ndis.gov.au). An example of a completed Support Coordination – Post Implementation Report can be found [here](#).

**Support Coordination – Plan Review Report**

The Support Coordination – Plan Review report is completed and submitted to the NDIA by the Support Coordinator in preparation for the client's NDIS Plan review. The report captures how the client has progressed toward their goals, the effectiveness of their formal and informal supports and captures additional evidence that will be considered by the NDIA when reviewing the client's NDIS plan. An example of a completed Support Coordination – Plan Review Report can be found [here](#).

**LWB Welcome Pack**

All clients receiving any support products delivered by LWB are to receive the LWB 'Welcome Pack'. The Disability Pathway [Engagement](#) page provides information about what must be included in the Pack. Support Coordinators are to note that in addition to the generic forms in this Pack, they are to provide the client with a copy of the [NDIS LWB 203 Support Coordination - Looking for Support Coordination Brochure](#).

**NDIA required Documentation - for Claiming and Validating Support Coordination**

Minimum identifying information for all claim documentation includes the participant's name, the date(s) of support delivery, the total quantity of the support delivered each session and the support type. Whenever possible, documentation should include a participant's NDIS number. In addition to the collection of minimum identifying information, the NDIS requires a Log, Case Notes and Agreement as additional standard documentation for the delivery of Support Coordination.

**Support Coordination Record Keeping Requirements**

Every client supported by LWB must have a CIRTTS file. The [Support Coordination and CIRTTS - Quick Reference Guide](#) is specific to Support Coordination providing advice for Support Coordinators to manage privacy and potential conflicts of interest.

The QRG outlines how Support Coordinators can appropriately maintain privacy for those clients who receive Support Coordination from LWB as well as other services. This includes how to appropriately set up the correct security groups, lock progress notes, record the selection of providers and save external Service Provider documentation.