

# How to create a Basic Budget

## (for your NDIS funding)

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Firstly, why is it important to create a budget when it comes to your NDIS plan funding??

Answer - so that you can keep track of things such as how much funding you have remaining and how much funding you are utilising on a particular service!

To put it simply, a budget is a great tool that we use as Support Coordinators and Recovery Coaches at Marli and Moe, when supporting you. We create these as a capacity building tool which also assists keeping track of the providers you have engaged, with detailed costs from signed Service Agreements.

Reach out to your Support Coordinator or Recovery Coach today to request a copy of this if you haven't already got one!



### A NOTE ON PLAN MANAGED FUNDS

Most Plan Managers have an online 'portal' where you can login and view your funds view their system. This will generally also show all of the invoices paid, funds remaining and funds spent.

For information on Plan Management, their role and benefits, follow the link here:

<https://www.ndis.gov.au/participants/creating-your-plan/ways-manage-your-funding/plan-management>

### A NOTE ON NDIA MANAGED FUNDS

By accessing your plan via the 'myplace portal' or the 'my NDIS portal', this will view your total funds remaining, total spent funds and overall plan budget.

More information can be found here:

<https://www.ndis.gov.au/participants/using-your-plan/managing-your-plan/how-use-myplace-portal>



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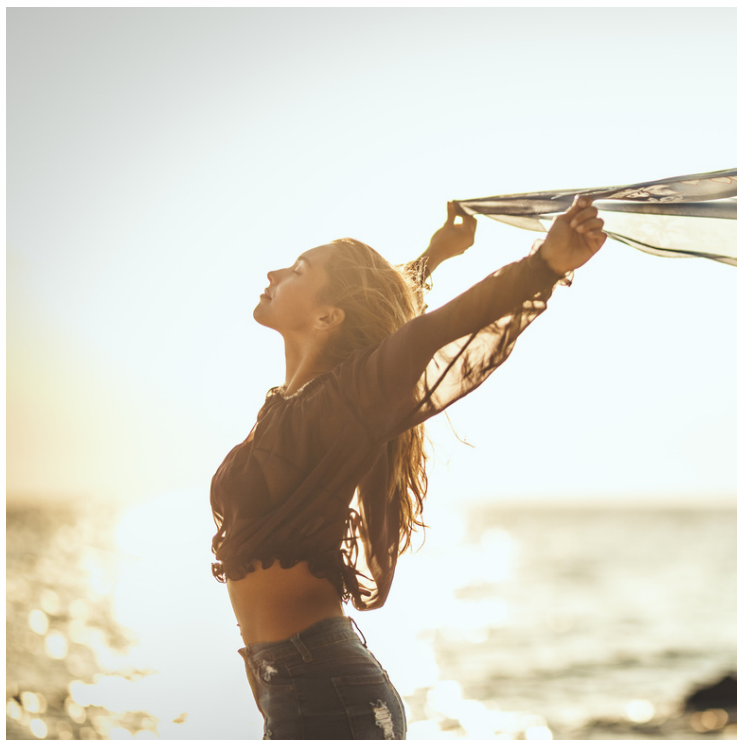
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### BASIC BUDGET SETUP

- Programs that can be straightforward to build a budget in is often something like Microsoft Excel, Google Sheets or even apps on your phone or tablet. For the below example, this is completed on Excel or Google Sheets.
- We want to make sure to have a copy of your plan, with the funding amounts clearly shown.
- You will want to create a column with the funding categories in your plan ie
  - Core Supports
  - Improved Daily Living
  - Improved Health and Wellbeing
  - Improved Relationships
  - Increased Social & Community Participation
  - Finding & Keeping a Job
  - Improved Life Choices
  - Support Coordination
  - Improved Learning
  - Improved Living Arrangements
  - Assistive Technology
  - Home Modifications
- Next, you'll want to create another column stating the 'Total Funds' in the above categories.
- Create another column where you can input the 'Funds Spent'.
- Finally, create another column where you'll add a **formula** to automatically calculate the 'Funds Remaining' OR simply calculate this yourself and add the total in.

### EXAMPLE SHOWN BELOW

Category	Total Funds	Funds Spent	Funds Remaining
Core Supports	\$0.00	\$0.00	\$0.00
Improved Daily Living	\$0.00	\$0.00	\$0.00
Improved Health and Wellbeing	\$0.00	\$0.00	\$0.00
Improved Relationships	\$0.00	\$0.00	\$0.00
Increased Social & Community Participation	\$0.00	\$0.00	\$0.00
Finding & Keeping a Job	\$0.00	\$0.00	\$0.00
Improved Life Choices	\$0.00	\$0.00	\$0.00
Support Coordination	\$0.00	\$0.00	\$0.00
Improved Learning	\$0.00	\$0.00	\$0.00
Improved Living Arrangements	\$0.00	\$0.00	\$0.00
Assistive Technology	\$0.00	\$0.00	\$0.00
Home Modifications	\$0.00	\$0.00	\$0.00



FOR MORE INFORMATION  
YOU CAN CONTACT US ON:

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