



# Mental Health Carer Checklist

to prepare for National Disability Insurance Scheme  
assessment & planning meetings

## Purpose of this checklist

This checklist is designed to assist carers to describe the support they provide to contribute to the National Disability Insurance Scheme (NDIS\*) planning process for someone with a **psychosocial disability**. It is not a compulsory part of the NDIS planning process and you do not have to complete it. It may be of use to you in the preparing for your participation in planning sessions or in talking to the NDIS about your role.

It should be read in conjunction with 'Guide for mental health carers on the NDIS' developed by Carers Australia and Mental Health Australia. The guide provides information about your role as the carer in the NDIS and what supports are available for carers through the NDIS.

*\*Words and acronyms in bold are explained at the end of this document.*

## Background

Under the NDIS people with disability will be assessed for their eligibility to receive an **individual funded package** of support. If they are deemed eligible, each **participant** will have a meeting with the National Disability Insurance Agency (NDIA) to develop their individual plan. This plan outlines the supports that will be funded by the NDIS and is tailored to their goals, personal circumstances and disability support needs.

Most carers and families of people with a **psychosocial disability** have important perspectives on the support needs of the person with a **psychosocial disability** whom they care for. These perspectives can be extremely useful for NDIS assessors and planners to consider when working with that person. This checklist aims to assist you in preparing to discuss those perspectives with the NDIA.



## Who is this checklist for?

This checklist is for people who provide unpaid care and support to a family member or friend with a **psychosocial disability** who is a **participant** in the **NDIS** or who is eligible to be a **participant**.

## Where is this checklist available?

This checklist is available from the Mental Health Australia and Carers Australia websites:

[www.mhaustralia.org](http://www.mhaustralia.org)

[www.carersaustralia.com.au](http://www.carersaustralia.com.au)

## How to use this checklist

Filling out the checklist will assist carers to think about and describe the supports they provide to a person with a disability.

It is common for carers to feel confused, nervous and maybe even a bit overwhelmed by how to help the person they care for to access and prepare for the **NDIS**. This is normal, and it is important to remember that the **NDIA** staff are there to help you and the person you care for to achieve a positive outcome.

How carers are involved in **NDIS** assessment, planning and review processes will vary according to individual **participants'** circumstances. For example, carers might go along to the planning meeting with the **participant**, be listed in the **participant's** plan as an informal support and/or help the **participant** to access funded services and supports. It is important for the **NDIA** to understand what your caring role involves so that the support package allocated to the person you care for meets their needs and supports your ongoing caring role.

Important information may include *what* you do as a carer, *how often* you do these tasks and how caring is affecting you and other family members. You will also need to tell the **NDIA** if you want to keep providing the same level of care, or if you need extra *help* and support to keep providing care.

The questions on the following pages are a prompt to help you think about what you will need to tell the **NDIA**. For those who care for someone with an episodic (on and off) condition or disability, you may need to explain how your caring role changes when the care recipient is relatively 'well' versus when they are unwell.

Please remember, this is not a complete list and there may be other issues you need to discuss with the **NDIA** which are not mentioned here. A useful question to ask yourself may be; *"If I was away or unable to care for a week, what would I need to tell the person who took over my caring role?"*

## The caring context



### Living arrangements

Does the person you care for live with you? (Either permanently or occasionally) Yes / No

Would either you or the person you care for prefer to change this arrangement? Yes / No

If the person you care for lives elsewhere, are you responsible for ensuring they have affordable, safe, secure and suitable accommodation? Yes / No

Are you financially responsible for this accommodation? Yes / No

Who is responsible for maintaining the accommodation/property? Yes / No

Does it take you a long time to travel to where the person you care for lives? Yes / No

If 'Yes', how long and by what transport? \_\_\_\_\_

Are the current living arrangements sustainable in the short to medium term? Yes / No

If 'No', why? \_\_\_\_\_

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Other comments \_\_\_\_\_

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## Additional caring responsibilities

Do you care for more than one person with a disability or illness? Do you care for other family members who do not have a disability? (e.g. children—either your own or the children of the person you care for). Do you think your family circumstances may change in the near future and you may take on additional caring duties (e.g. for ageing parents)? If yes, will this affect the current level of care you provide?

Comments \_\_\_\_\_

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## Other supports

Does anyone else also undertake caring responsibilities for the person? How do they help?

Comments \_\_\_\_\_

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## Culture and religion

Are you able to access culturally appropriate services or supports, for example those which take into account your religious practices or aspects of your culture?

Comments \_\_\_\_\_

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## Personal characteristics

Does your age, gender or any other personal issues in relation to the person you care for create any difficulties for you? Does this impact on the relationship between you and the person you care for?

Comments \_\_\_\_\_

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## The caring role

Think about what you do on a daily or weekly basis as well as things you do less frequently. How many hours would you spend each week or month assisting, supervising or prompting the person you care for with:



## Domestic life

For example, encouraging and helping them to get up in the morning and to keep healthy sleeping patterns; helping them to manage their finances; paying rent and bills; helping them shop for groceries; support and encouragement in cleaning their house; washing their clothes; helping to care for their pets.

Tasks	Time spent	How often?





## Personal care

For example, encouraging and supporting healthy eating and drinking patterns; assisting or encouragement with preparing food; encouraging good hygiene practices; assisting, encouraging and supporting the participant to obtain and wear appropriate clothing.

Tasks	Time spent	How often?



## Advising and providing emotional support

For example, helping them manage the symptoms of mental illness (such as hearing voices or delusions) and reassuring and calming them if they're distressed; assisting and providing suggestions on positive ways of responding to challenges and stresses; supported decision making; motivating and assisting to reframe thoughts in a positive manner; supporting through events the person is worried or concerned about; prompting or providing assistance with planning and problem solving; assisting with managing their environment to avoid triggers for stress.

Tasks	Time spent	How often?





## Health and treatment

For example, researching and discussing treatment or therapy options with participants, providing support in decision making or if necessary providing substitute decision making that is appropriate and required; prompting, encouraging and supporting the person you care for to take medication or to follow a prescribed treatment; arranging or giving medication where this is required; planning for and providing transport to medical appointments.

Tasks	Time spent	How often?



## Social activities

For example, providing and helping to organise social activities with others; providing transport for social activities and/or attending with the person you care for; reducing/calming anxiety and fear about leaving the house and/or interacting with others; encouraging and supporting the person you care for to interact and engage with other people.

Tasks	Time spent	How often?





## Advocacy and representation

For example, assisting the person you care for to self advocate and negotiate around personal affairs including managing outstanding accounts; managing their finances; maintaining stable accommodation and avoiding housing eviction and homelessness. Where necessary the carer may need to advocate and represent the person they care for in these personal matters.

Tasks	Time spent	How often?



## Coordination of services and support

For example, arranging support services (such as peer support workers); phone calls to providers and government departments to arrange income support or access to services; filling in application and assessment forms; researching support options.

Tasks	Time spent	How often?







## Employment, education, training

For example, transporting the person you care for to and from work or education/training; reminding them of starting times or projects in need of completion; assisting them to understand and complete tasks.

Tasks	Time spent	How often?



## Total time spent on all caring activities

Per day: \_\_\_\_\_ Per week: \_\_\_\_\_



## The impact of caring on you

There is no separate carers' needs assessment in the **NDIS** and no support plan for carers. However, it is still important that the planner understands the impact of your caring role. The following may help you to describe this impact.



### Physical and mental health

How are you physically and emotionally? Do you have any medical conditions which currently (or may in the near future) affect your caring role? Does your caring role affect your physical or mental health? For instance, do you experience depression or anxiety? Have you sustained any injuries due to caring? Does the behaviour of the person you care for ever put you or other family members at risk of harm or injury or impact negatively on your physical and or emotional health and wellbeing?

Comments \_\_\_\_\_

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### Financial

Do you have any added financial burdens as a result of your caring responsibilities? For example, do you pay, or contribute to costs of services/support; medication/treatment; transport to appointments; accommodation costs; educational costs; legal bills; additional child-care costs (for other dependent children whilst attending to the person you care for, or for their children)?

Comments \_\_\_\_\_

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## Time

Does your caring role regularly prevent you from looking after yourself, taking time out or meeting other family responsibilities or activities? Does it prevent you from undertaking domestic tasks such as shopping or cleaning, or attending your own medical appointments? Does it isolate you from other family and friends or social activities?

Comments \_\_\_\_\_

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## Employment and education

Are you currently in full or part-time work, education or training? Have you had to reduce the time you put into any of these either partly or completely due to your caring role? Would you like to undertake work, education or training but are unable to due to your caring role?

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## Services and Support

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### Continuing care

Can your current caring arrangements continue over time without more services or support? Do you think you can continue to provide the same level and type of care?

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### Accessing services and support

Do you need to travel long distances to get certain services or supports? Do you have private transport? Are you able to use public transport or are you required to use taxis? Are you on any waiting lists to access support? Have you had any issues with the quality of services and support?

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## Caring needs

What would help you with caring? For example, more information about the condition of the person you care for and treatment options; education/training about how to respond in a positive and helpful way in distressing or challenging situations; how to access early intervention when you know that the person you care for needs it; assistance in looking after your own health and wellbeing; information on financial support which may be available; access to counselling or support groups; cleaners; professional assistance with accessing, managing and coordinating services for the person you care for (case management)?

Would access to certain services and supports help you to continue providing care? For example, taking a short break from caring (**respite**) while the person you care for is being looked after by someone else (either in the home or elsewhere). This could be for a short time or for a holiday; regular **respite** so that you know you have time out from your caring role on a regular basis and can commit to other activities.

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## Emergencies/ alternative arrangements

Do you have a plan for when you are unable to provide care? (Either in response to a short-term crisis or for the longer-term). Do you need any information or assistance to make such a plan? Do you have an **Emergency Care Plan**, which the **NDIA** should know about? Does the person you care for have an **advance directive**, which the **NDIA** should know about? Is the plan of the person you care for flexible enough to respond to changing circumstances or support needs?

Comments \_\_\_\_\_

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# Is there anything else the NDIA should know?

If there was one thing you really need to tell the NDIA what would it be?

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## Key terms

<b>Advance directive</b>	An advance directive is a document prepared by a <b>mental health consumer</b> to be read and used in case of a mental health crisis. Typically advance directives contain special information outlining a person's unique circumstance, personal preferences regarding treatment choices and information about practical life management arrangements. An advance directive outlines the steps that must be taken to provide optimal support and care for a person with a mental illness during a time of crisis in order to limit or prevent the damage from that crisis. <sup>1</sup>
<b>Emergency Care Plan</b>	An Emergency Care Plan is a document that provides instructions and guidance to allow someone else to step in and provide the care which you would normally provide. An Emergency Care Plan can give you reassurance that if anything should happen to you, the person you care for will still receive the support they need. <sup>2</sup>
<b>Individual funded package (IFP)</b>	Eligible <b>NDIS participants</b> receive an individualised plan which outlines the supports which will be funded by the <b>NDIS</b> . This is called an individual funded package.
<b>Mental health carer</b>	Someone who provides unpaid care and support to a family member or friend with a <b>mental illness</b> or <b>mental health condition</b> . A carer may or may not live with the person they support, and may not be identified by the individual with a <b>mental illness</b> to be their carer.
<b>Mental health condition</b>	Describes the broad range of features that characterise a <b>mental illness</b> whether diagnosed or not.
<b>Mental health consumer</b>	A person with a lived experience of mental illness or a <b>mental health condition</b> . Also referred to as a consumer.

<sup>1</sup> Federation of Community Legal Centres Victoria. (2015). *Mental Health Legal Centre Inc. Advance Directives For Mental Health*. Retrieved September 29, 2015 from [www.communitylaw.org.au/mentalhealth/cb\\_pages/advance\\_directives.php](http://www.communitylaw.org.au/mentalhealth/cb_pages/advance_directives.php)

<sup>2</sup> Carers NSW. (n.d.) *Emergency Planning*. Retrieved September 29, 2015 from [www.carersnsw.org.au/advice/plan-ahead/emergency-plans](http://www.carersnsw.org.au/advice/plan-ahead/emergency-plans)

<b>Mental illness</b>	Diagnosable illness that significantly interferes with an individual's cognitive, emotional and/or social ability.
<b>NDIA</b>	National Disability Insurance Agency. The NDIA is in charge of running the <b>NDIS</b> .
<b>NDIS</b>	National Disability Insurance Scheme.
<b>Participant</b>	An individual who is an eligible participant in the National Disability Insurance Scheme.
<b>Psychosocial disability</b>	<p>An internationally recognised term used to describe the experience of people with impairments and participation restrictions related to mental health conditions. These impairments can include a loss of ability to function, think clearly, experience full physical health, and manage the social and emotional aspects of their lives.</p> <p>Please note: You might notice some differences between the terms used in <u>NDIS materials</u>,<sup>3</sup> which refer to "impairments" attributable to a "psychiatric condition" and "reduced psychosocial functioning", and this checklist, which refers to psychosocial disability. Mental Health Australia and Carers Australia prefer to use the term "psychosocial disability".</p>
<b>Respite</b>	A short break from the caring role that may include replacement care in the home, activities outside the home for the person receiving care, or replacement care in a residential facility.

<sup>3</sup> Available at: [www.ndis.gov.au/about-us/information-publications-and-reports](http://www.ndis.gov.au/about-us/information-publications-and-reports)

