



WHAT DO I TAKE TO MY NDIS PLANNING MEETING?

MAY 2023

This checklist is for people who:

- have been approved by the NDIS
- have been contacted by the NDIS or a Local Area Coordinator (LAC)
- have a scheduled planning meeting.

It is very important to prepare for your NDIS planning meeting. You can get ready for your planning meeting by working with your health team, support network, friends or family.

This checklist may help you gather all the things that you might need for your planning meeting.

☐ A list of your current disability supports

This should include information relating to:

- Your current daily routines (e.g. work, study, social programs)
- Both paid and unpaid support that you need for these activities (e.g. transport, equipment, support person)
- Identify any changes you'd like to make to the type or amount of disability support you currently receive

Examples of tools and resources that might help you:

NDIS Booklet 2 - Creating your NDIS Plan

🌐 ndis.gov.au/about-us/publications/booklets-and-factsheets

Yooralla: guide to prepare for the NDIS

🌐 info.yooralla.com.au/prepare

Independence Australia: pre-planning booklet

🌐 independenceaustralia.com.au/ndis-resources

□ A summary of your short-term and long-term goals

This should include information relating to:

- Relationships: friendships, communication skills, confidence
- Daily living: independence, skills, transport, money management
- Home: modifications, safety, improved living arrangements
- Work: finding and keeping a job
- Social and recreational activities: hobbies, classes
- Health and wellbeing: meal preparation, exercise/relaxation, weight management
- Learning: learning to drive, informal or formal study, exploring post-school options

Examples of tools and resources that might help you:

NDIS - Setting goals

🌐 ndis.gov.au/participants/creating-your-plan/setting-goals

Australian Unity planning tool

🌐 australianunity.com.au/disability-services/NDIS-planning-tool/intro

□ A detailed list of your support needs

You need to be prepared with exactly what you will need in order to work towards your goals. All of your support needs will need to be outlined in detail in your planning meeting.

Consider:

- Care
- Equipment
- Continence
- Behaviour Support
- Support Coordination
- Home and vehicle modifications

You will need to provide a list of all the equipment you need to purchase, have repaired, replaced or maintained during the course of the plan. You need to know how many hours of allied health support is required to complete necessary assessments for equipment, home modifications, vehicle modifications etc. Allied health providers will provide quotes for these that can be taken to the meeting.

Examples of tools and resources that might help you:

NDIS webpage: Plan budget and rules

🌐 ndis.gov.au/participants/creating-your-plan/plan-budget-and-rules

Endeavour Foundation Discover Guide


🌐 endeavour.com.au/ndis/resources

❑ A plan for who you might like to help you to manage your supports:

You will need to think about how you would like to manage each of your supports and request this in the meeting.

If you think you will have lots of services or equipment that you will need to organise, you might be able to have funding for a Support Coordinator to work with you.

More information on Support Coordinators can be found here:

 ndis.gov.au/participants/using-your-plan/who-can-help-start-your-plan/support-coordination

Examples of tools and resources that might help you:

- Diagnostic test results
- Clinical reports
- Functional assessments
- Disability management/support plans
- Behaviour support plan
- Recommendations from allied health assessments
- Letters from your doctor or health professional

❑ Information about your disability or your health

This should include information relating to:

- Diagnosis of disability or medical condition
- Evidence to support diagnosis
- Evidence of the impact of your disability on your functioning e.g. mobility, communication, social, learning/memory, behaviour etc

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❑ Support person

You can have a support person, or a couple of people, with you in your planning meeting. Think about who you might want to be there, and give them as much notice as you can to make sure they can put aside time to attend.

Examples of tools and resources that might help you:

This person could be a family member or friend, but could also be a disability advocate, a trusted staff member from your health service or aged care facility, or you can attend on your own.

❑ Other documentation relating to your life and your supports

This should include information relating to:

- Information about your current level and type of disability support:
- State or Commonwealth disability funding packages
- Quotes for equipment, consumables, home/vehicle modifications, or any other supports that you would like to be considered for inclusion in your plan
- Information about your hobbies and interests
- Information from your study site or workplace about your needs

Examples of tools and resources that might help you:

- Individual support package or other funding sources
- Activity schedules or recreation program information
- Information and quotes from current service providers
- Quotes or screenshots from Australian websites
- Photos can provide a great illustration of the way you'd like to live your life (e.g. a photo of you at the beach, with a support worker, using a beach wheelchair and beach matting) or can show the need for home or other modifications (e.g. a photo of your bathroom with your wheelchair unable to fit)

If you are in aged care:

1. Accommodation Agreement
2. Residential Care Agreement
3. Current letters about aged care fees from the Department of Human Services
4. Statement from your residential aged care facility detailing their means-tested care fee and accommodation payments

❑ Bank account details

Solely to be used for NDIS participant funds

Examples of tools and resources that might help you:

- BSB
- Account number

❑ Identity verification

Evidence of age and residency

Examples of tools and resources that might help you:

- Birth certificate
- Birth extract
- Driver's licence
- Medicare card

□ Contact details

Once your plan is finalised it will be automatically posted to you. Make sure your planner has all your current contact details. Or you can nominate another person to be a point of contact if you feel they are more likely to be able to answer the phone, or check for postage.

Examples of tools and resources that might help you:

- Email address
- Postal address
- Phone number

□ List of questions

This is your opportunity to ask about what the NDIS will fund or how the planning process works. Take your time to make a list of questions – your planner will be happy to go through them all.

Examples of tools and resources that might help you:

Ask for clarification of your goals and support needs – to make sure you and your planner are both on the same page.



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We value your feedback about this resource

Please contact the Summer Foundation by email at: **info@summerfoundation.org.au**, or by phoning 1300 626 560

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Connect with us: