

NDIS Planning Meeting Checklist

Prepare thoroughly — this meeting sets the foundation for your entire plan

BEFORE YOUR MEETING

Complete all items below before your NDIS planning meeting for the best possible outcome.

- **Write down your goals**
What do you want to achieve? Think across daily life, relationships, health, work, community and learning.

- **Document your support needs across a typical week**
Be specific and honest. Include support from family members and unpaid carers.

- **Gather reports from your treating team**
GP, OT, physio, psychologist, paediatrician — the more detailed and specific, the better.

- **Ask your practitioners to quantify your needs**
E.g. "requires 14 hours/week of personal care support" is more useful than "high support needs."

- **Research appropriate services and providers**
Have an idea of what types of support you want and who might deliver them.

- **Know your functional capacity levels**
Think about communication, social interaction, learning, mobility, self-care and self-management.

- **Identify informal and community supports**
Know what family/community support exists — but don't let planners replace funded supports with these.

- **Prepare questions to ask the planner**
Write them down so you don't forget under pressure.

- **Arrange for a support person to attend**
A family member, Support Coordinator or advocate can be invaluable.

DOCUMENTS TO BRING

- **Proof of identity (Medicare card, passport or driver's licence)**

- **NDIS access letter (if received)**

- **All medical and allied health reports — ideally dated within 2 years**
- **Existing supports and service agreements**
- **Your written goals and support needs list**
- **List of questions for the planner**

DURING THE MEETING

- **Describe your worst days, not just your best**
The NDIS needs to understand your real support needs, not an aspirational version.
- **Speak to all six functional domains**
Communication, social, learning, mobility, self-care, self-management.
- **Connect supports to your goals**
For each support, explain how it helps you achieve a specific goal.
- **Don't downplay your needs out of politeness**
Being honest about what you struggle with is not complaining — it's essential.
- **Ask for clarification on anything you don't understand**
- **Don't agree to anything you're unsure about — take time to think**
- **Take notes or ask for the meeting to be recorded**

AFTER THE MEETING

- **Review your plan carefully when received**
Check it reflects what was discussed and that funding is adequate.
- **Request an internal review within 3 months if needed**
If your plan doesn't meet your needs, you have the right to ask for it to be reviewed.
- **Contact providers to start setting up services**
- **Share your plan with your Support Coordinator if you have one**

Need help preparing? Lyft Community can help you prepare for your NDIS planning meeting — contact us on lyftcommunity.com.au

