

Planning Meeting Checklist

This Planning Meeting Checklist includes the supporting evidence that you may be asked for during your planning meeting. Every person is different, so you may not require everything listed in this checklist. Review the list carefully and be sure to bring as much supporting evidence as possible to your meeting. This checklist is designed for new NDIS participants who are preparing for their first plan. If you are already an NDIS participant and need to prepare for your plan review meeting, we have a Plan Reassessment Checklist available instead.

PERSONAL INFORMATION

- Birth certificate (and/or drivers licence and Medicare card)
- Contact details (email address, postal address and phone number)
- Bank account details (BSB and account number)
- MyGov login and password details
- A list of any questions you may have

YOUR DISABILITY & HEALTH

- Diagnosis from specialists
- Therapist reports & assessments
 - Occupational therapist & Speech pathologist reports
 - Home modifications assessment
 - Neurophysical assessment
 - Psychological assessment & mental health reports
 - Incontinence assessments & management plans
 - Care needs assessments
 - Manual handling assessments & training
 - Any evidence or other information that may be relevant for the NDIA to consider when determining reasonable and necessary supports
 - Justification for any recommendations of additional supports, including details of the proposed outcomes and any risks or impacts on other supports (if relevant)

- Medication charts
- Any other important documents

OTHER DOCUMENTATION ABOUT YOUR LIFE & SUPPORTS

- List of your current disability supports
- Schedule of regular daily living activities (work, study & social)
- Hours of personal care
- List of equipment, aids and home modifications you require with supporting evidence
- Letters from current support providers
- Letters for study facilities or work places about your needs
- Quotes for equipment, consumables, home/vehicle modifications and any other supports you want considered
- List of hobbies & interests
- List of short & long term goals
- Any accommodation or residential care agreements

Contact our friendly team

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