



## **NDIS – Preparing for a Planning Meeting**

*This leaflet is to offer you some brief information about the process*

Some people will have been transitioned to the NDIS from an existing service. If this is the case for you, you need to work with this service to make sure the transition has occurred and also to know who your NDIS service program coordinator is.

If you are new to the NDIS, it is a good idea to work through the NDIS Planning Workbook before applying – and certainly before attending a Planning meeting with the NDIS. You can find it here: [www.everyaustraliancounts.com.au/wp-content/uploads/NDIS-Planning-Workbook.pdf](http://www.everyaustraliancounts.com.au/wp-content/uploads/NDIS-Planning-Workbook.pdf)

### **What to bring to your Planning Meeting**

- Someone to support you. You can bring anyone you like. This might be a parent, guardian, support person from a current service provider or an advocate. You don't *need* to bring anyone, but it can be helpful to have someone you know with you – to provide emotional support or fill in any gaps in information that is required.
- Documentation related to your life, supports, health or disability. This could include documents about you or your family, letters from your doctor, day program rosters, information from your workplace about your needs, activity schedules, a behaviour support plan or equipment recommendations.
- Information you have prepared beforehand about your short and long-term goals, current supports, relationships, living arrangements and activities. Goals may include participation in activities.
- Specialist reports and therapy assessments. If you have been assessed by a specialist, make sure you bring any reports that include recommendations for certain therapies or supports. Make sure the reports have as much detail as possible about why you need these supports or therapies. The specialist should include information about how often you will need the recommended therapy and how the supports will help you work towards your goals.
- A list of questions you would like to ask the Planner.

### **Useful Links:**

NDIS Planning Workbook:

[www.everyaustraliancounts.com.au/wp-content/uploads/NDIS-Planning-Workbook.pdf](http://www.everyaustraliancounts.com.au/wp-content/uploads/NDIS-Planning-Workbook.pdf)

Disability Support Guide:

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

*Disclaimer – the information given here is of a general nature only and you should seek clarification of any statements made (last up dated 22/09/2019)*



## **NDIS – What to Expect at your Planning Meeting**

*Some people will meet directly with a Planner from the NDIS. Most will meet with a representative from an NDIS Local Area Coordinator, or LAC.*

1. Make sure you ask the Planner questions and ask them to read back what they have written about your goals and support needs so you can make sure you both agree.
2. The Planner will ask you a lot of questions. Answer the Planner's questions calmly and to the best of your ability. All of these questions are not because they don't believe you or because they are trying to 'trip you up'. It is to make sure they quickly get to know as much as possible about your life, goals and needs and so they can try to make the best Plan to meet your needs.
3. Based on the information you provide to the Planner, they will work with you to develop a Participant Statement. This is a description of how you would like to live your life in the future. It also includes information about your life, what is important to you, the supports you have in place, and your social and economic participation.
4. Working together, you will turn your goals into a set of actions and then work out steps you need to achieve them. If you don't know what your long term goals might be, you can work on your immediate needs and update long term goals in future Plans.
5. Your Planner should also talk to you about all the options for managing your Plan and the funding. You will be the person to make the decision about which way is the best for you, although the Planner may recommend one way to you.
6. Once your Planner has all the information they need, they will write a Plan of Supports for you. This will be sent to the National Disability Insurance Agency (NDIA) for approval. The Plan the NDIA agrees to may be different from what was discussed with the Planner in the Planning Meeting.
7. Once your Plan has been approved, you will receive a paper copy in the mail – unless you have specifically requested a different format because of your disability. This letter will contain an activation code to link your myGov account to the NDIS Portal.
8. Within a week you should be contacted by the NDIA to talk with you about how to put your Plan into action. Your Plan should last for one year, but in some cases it may be for a shorter period.

### **Useful links:**

Reviews of NDIS/NDIA decisions:

<https://www.ndis.gov.au/participants/how-review-planning-decision>

NDIS Review of a decision factsheet:

<https://www.ndis.gov.au/participants/how-review-planning-decision>

NDIS Planning Workbook:

[www.everyaustraliancounts.com.au/wp-content/uploads/NDIS-Planning-Workbook.pdf](http://www.everyaustraliancounts.com.au/wp-content/uploads/NDIS-Planning-Workbook.pdf)

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