



NDIS PLANNING MEETING CHECKLIST

We understand preparing for your first planning meeting with the NDIS can be a daunting experience. We also understand that you want to get the best possible outcome for yourself or your loved one.

This is where we can help!

As your trusted partner, we have developed this checklist and a Planning Workbook to help you be as prepared as possible, and get the most out of your NDIS planning meeting.

**COMMUNITY
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AUSTRALIA**

BEFORE YOUR PLANNING MEETING

- Complete Community Living Australia's pre-planning workbook – available at claust.com.au
This will help describe you, your goals and your needs to your planner.
- Set up your **MyGov** account (this is where your plan will appear after your meeting).
You can access **MyGov** at: www.my.gov.au
- Ask your service provider/s to email you all documents detailing the supports you receive, and the expected outcomes from these supports.
- Provide the documents from your service provider to your planner and make sure you keep your originals.
- List any products you need to support you. *e.g. continence aids, assistive technology*
- Collate any health assessments you may have.
- Obtain quotes for any assistive technologies and equipment that could benefit you.
- List any community supports who currently support you, how they support you and their contact details. *e.g. community bus for travel*
- List the people who support your health, such as doctors and therapists, how they support you, and provide their contact details.
- Decide how you would like your plan managed:
 NDIA Managed Plan Managed Self-managed Combination
- Choose a meeting time that suits you. If you would prefer to meet face-to-face rather than by phone, please ask when selecting your meeting time.
- Organise for family, a friend or support person to come to the meeting with you, to support and remind you in case you forget anything important.

AT THE MEETING

- Ensure you have the right people with you to support you through the meeting.
- Bring your current medical documents.
- Bring along any health assessments you might have received in the past.
- Bring copies of all documentation, including your pre-planning workbook, quotes for equipment or modifications, and your previous service and supports history.
- Ensure you have kept all the originals of these documents for yourself.
- Stay calm. This meeting is about you and you are in control of it.

For more information please visit our website: claust.com.au

Contact us: **08 8536 5888** | info@claust.com.au