

# WHAT TO EXPECT IN YOUR NDIS PLANNING MEETING

Your NDIS planning meeting is probably the most important step in your NDIS journey. What will be included in your NDIS plan is largely determined by what is discussed in this meeting.

In this article we look at what exactly happens during a planning meeting, so you know what to expect and can prepare yourself.

While each meeting can be different, they generally follow a similar format. So, if you've never been to an NDIS planning meeting before or would like a quick refresher before your annual review, let's take a look at what you can expect during a session.

## Step 1 – Introductions

After you enter the room, the Planner (either a Local Area Coordinator (LAC) or National Disability Insurance Agency (NDIA) representative) will introduce themselves and ask some basic questions. If you're a bit nervous, this is a good chance to relax and ease into the session by making conversation or asking any burning questions you have.

## Step 2 – Your story

The first step in your planning meeting is to create your 'participant statement'. This forms the *About Me* section of your NDIS plan and is essentially a brief snapshot of you and your life situation. The Planner will talk you through this and write down your responses.

Because it can be a bit hard to think of everything on the spot, we recommend preparing this ahead of your planning meeting to ensure you cover all the key points - our handy 'getting ready for the NDIS checklist' (available on [our Resources page](#)) is a useful tool for this. While highly personal, some things you might like to include are: your living situation,

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your health requirements, your employment or education situation, your hobbies and interests, and how you get around.

### **Step 3 – Your needs**

After getting an overview of your situation, the Planner will want to find out a bit more about how much assistance you need in your day-to-day life. This is done using a questionnaire, called the WHODAS (world Health Organisation Disability Assessment Schedule), which asks you to rank your ability to perform certain functional tasks out of 5 (NB if you're under 17, you'll answer a slightly different questionnaire, called the PEDI-CAT.)

The questions will cover topics like daily assistance, mobility, health and well-being, relationships and fine and gross motor skills questions. Your responses will help to determine the level and type of funding you receive, so take your time and try to answer as accurately and specifically as possible.

### **Step 4 – Your goals**

The next step is to talk about your goals. This is an important part of your planning meeting, as goals are one of the cornerstones of the NDIS and you will only receive funding for supports if they can be tied back to your goals. Your Planner will ask about two kinds of goals: short term and long term.

Short Term goals are those than can be accomplished within the next year, such as wanting to become more confident when catching public transport. Long term goals look at what you want to achieve over the next 5 or so years, such as learning to walk unaided. You're usually allowed up to 2 short term and 5 long term goals in your plan. So make sure you've thought about these goals ahead of your meeting so you can get the most out of your plan.

### **Step 5 – Impact Statement**

The last official step in a planning meeting is to create your 'Impact statement', which is designed to give an indication of the effect your disability has on those around you; particularly your primary carer. As you can imagine, this can be a particularly difficult part of the planning meeting as the questions asked might trigger an emotional response, but it's

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needed to get an even better understanding of your situation, so you can get the most relevant NDIS plan.

Part of this step is also to discuss what supports you might need in managing your NDIS plan. The two main questions are: Would you like to receive support with the financial management of your NDIS plan? If you request this, the NDIS has to include Plan Management in your plan, it's your legal right. The other question is whether you need someone to support you with finding and connecting with service providers? If so, the NDIS might determine to include Support Coordination in your plan, subject to their eligibility criteria.

## **Step 6 – Finishing up**

To finalise the meeting, the planner will ask you whether there is anything you would like to add that has not been discussed. Take the time to go through your checklist and make sure you've covered everything – if not, be sure to bring it up. The planner will then run you through the next steps and let you know what you'll need to do.

Before you leave, make sure you have the contact details of your planner (full name, phone number and email address), so you can get in touch with them any time after your meeting.

## **General tips**

Here are some general tips to make the most out of your planning meeting:

- Bring your checklist and any supporting documents to the meeting so you can refer them if you need to.
- Ask a friend or someone you trust to come along for support.
- Take notes so you can check things later.
- Express your needs and your goals in life clearly so that your Planner knows exactly what you want in your plan.
- Ask questions! Don't be afraid to speak up or ask questions if anything is unclear.

So even though your planning meeting is very important, with the right preparation it shouldn't be too stressful, and you should walk into your meeting confidently. The result of

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your meeting could well be an NDIS plan that will give you the most freedom and control over the supports you receive.

If you have any questions about your NDIS planning meeting, including how Plan Management and Support Coordination can help you bring your plan to life, please contact our helpful team or call us on **07 5562 0466**.

The above information is a description of what a planning meeting usually looks like. Of course every meeting can be different and your planner might follow a different structure, but usually the above topics will all be covered.

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