



5 things you should know before your planning meeting

“WHAT IF I MISS OUT ON FUNDING?”

UNDERSTANDING HOW PLANNING MEETINGS WORK

Your first face-to-face chat with an NDIS planner is critical – and it’s normal to feel nervous. What should you say, what should you leave out? What if you don’t get the funding you need?

Don’t worry. Our experts have attended many planning

meetings and plan review meetings before. They have figured out what matters when talking to an NDIS planner.

This guide shares our knowledge with you, so you can walk into your meeting with confidence.



Get meeting-ready online!

The Provider Choice team of NDIS experts has developed two **free, easy and interactive help tools** to prepare you for your **planning meeting** or **plan review**. They will reliably assist you in getting the funding you need.

- Get ready for your **Planning Meeting** today:
<https://providerchoice.com.au/planning-meeting>
- Prepare for your **Plan Review** with our easy online tool:
<https://providerchoice.com.au/plan-reviewer>

Five things to remember before your planning meeting:

1. SET YOUR GOALS.

Your planning meeting will take about 1½ hours and a key question you'll need to answer is: what are your goals? You may hope to find a job, make friends or become a more confident speaker. Could you imagine trying a new sport, joining an art class or social group?

Collect three goals you want to reach over the next 12 months, and one or two longer-term goals.

2. START A JOURNAL.

Make sure your planner fully understands your situation. It's a good idea to journal your disability needs over the course of a week. Track everything you do and any money you spend in relation to the disability. Bring a copy to the meeting.

3. PRINT YOUR PAPERS.

Make photocopies of all relevant documents to bring on the day, from teacher reports and medical diagnoses to home modification assessments.

4. MAKE A WISH LIST.

Could an Apple iWatch improve your life? A speech therapist or a dietitian? Write down which therapy and care, assistive technology and equipment you think will help you reach your goals (list prices if you can). The NDIS will determine if it is 'reasonable and necessary' to fund the support you ask for. You can add weight to your claim by using these two terms when explaining your situation and needs.

5. IT'S OKAY TO FOLLOW UP.

If you miss a document or forget to make an important point, you can still send it to your planner in the days after the meeting. The NDIS will then assess your situation and typically send you a plan outlining your funding package within 2-3 weeks (but up to 3 months for complex cases).

Common goals

- finding and keeping a job
- improving my communication
- improving my relationships
- getting better at managing money
- improving my health and wellbeing
- becoming independent in daily life
- learning to drive a car / using public transport on my own
- moving out of home
- improving my social life
- doing more recreational activities

Who is Provider Choice?

We are NDIS experts. We provide plan management services and easy-to-use technology for all NDIS participants.

If you have any plan management questions or queries, please get in touch with:

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