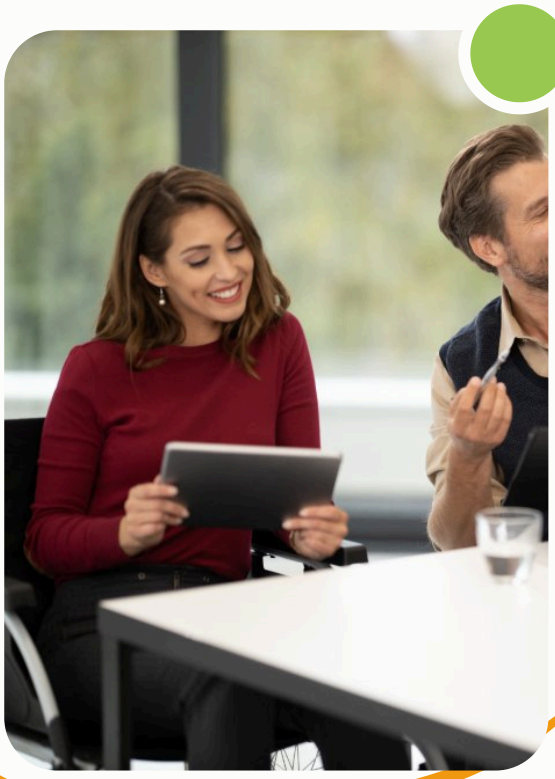
United Health Professionals

Your NDIS plan meeting: a prep pack.

A prep pack for families

Plain steps and worksheets to help you describe your family member's needs clearly and completely, so the planner sees the full picture.



1. The meeting now, and what to bring
2. Describing the real day, and goals
3. A typical-week diary
4. A carer statement template
5. Questions to ask, and what comes next

Describe the real week, hard days included.

United Health Professionals
Registered NDIS provider
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1

Know what the meeting is, and who you'll meet.

The NDIA (National Disability Insurance Agency) runs the NDIS. Your meeting might be for a first plan, a new plan or a check-in. This is how each one works in October 2026.

Plan meeting

For a first or new plan. You meet an NDIA planner, the staff member who approves plans. They show you the plan they've drafted, explain it and check it fits.

my NDIS contact

Your main helper at the NDIS. It may be a local area coordinator (LAC), an early childhood partner (for children under 9) or NDIA staff. They can't approve plans.

Check-in

Usually 2 to 3 months before the plan's reassessment date (when it's due to be redone). Your my NDIS contact asks how it's going. Plans can stay the same.

Meetings can be in person, by phone or on Microsoft Teams. You can bring a family member or friend. The planner drafts the plan before you meet, and sending information early can speed things up. If you share new information in the meeting, the planner may change the draft.

What changed in 2026

New NDIS laws passed in August 2026. From 1 October 2026, funding for social, economic and community participation and for improved daily living skills is being reduced as plans are made or reassessed. Some supports aren't affected, such as help with eating, dressing and toileting. From April 2027, adults will gradually move to a new way of planning that starts with a support needs assessment (a guided conversation with a trained assessor). The NDIA says it will tell people first.

Bring these, or send them before the meeting

- [ ] The current NDIS plan, if there is one
- [ ] Letters, assessments and quotes, such as for equipment
- [ ] Names of everyone who helps now, paid and unpaid
- [ ] The worksheets in this pack: goals, week diary and carer statement
- [ ] Recent reports from treating health professionals (the doctors and therapists who know the person)
- [ ] A list of current supports: who, what, how many hours, and the cost
- [ ] Other services used, such as school, health or community groups
- [ ] Your questions, paper for notes, and the meeting details

2

Describe the real day, including the hard ones.

The planner will ask about the person's living situation, goals, day-to-day supports and who helps now. Describe what really happens. Don't make it sound better or worse than it is.

Go through a usual day, from waking up to overnight. For each part, say what your family member does alone, what they need help with, who helps and how long it takes. Use real examples from the last few weeks.

Include help that's easy to forget, like reminders, keeping them safe, calming them down, help at night, and the planning you do in your head.

Don't leave out the hard days

It's easy to describe a good day without meaning to. If some days are much harder, say how often they happen, what changes and what you do.

If your own age or health is making care harder, say that too. Section 4 shows one way to put it in writing.

Goals worksheet

What's working well now? Things to keep

What isn't working well? Things that need to change

Goal 1, in their own words Let your family member lead if they can. Goals can be small or big, short or long term.

Goal 2, in their own words A plan needs at least one goal. The NDIS says more or bigger goals don't mean more funding.

Big changes coming up For example leaving school, starting work or moving out

3 Keep a diary for one real week.

Fill this in during an ordinary week before the meeting. In each box, note what help was needed, who gave it and about how long it took. Use the last row for anything that made a day harder.

Typical-week diary

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Morning							
Midday							
Afternoon							
Evening							
Overnight							
Hard day? What happened?							

4 A carer statement, in your own words.

A carer statement is a short letter from you about the care you give and how it affects you. It's optional. Aim for about one page, and describe things as they really are.

What the NDIS says

The NDIS says family and friends who support the person can give information about their own lives, if they want to. Carers can also describe how the disability affects daily life. This helps build a fuller picture, alongside reports from health professionals. Planners think about what is reasonable for family to provide, and whether that care can keep going, for example if a carer is ageing or unwell.

Carer statement

Your name and relationship to the person

Signature and date

The care you give in a usual week Personal care, prompts, supervision, transport, appointments, night help. Who else helps?

Hard days and nights How often they happen, what happens and what you do

How caring affects you Your health, sleep, work, income and the rest of your family

What you can keep doing, and what's changing Your age, health, other duties and plans

5 In the meeting, and what happens next.

It's okay to ask the planner to stop, repeat or explain things. Take your own notes. Tick off these questions as you go.

Questions you might ask

- [ ] How did you use our reports and information to make the plan?
- [ ] Can you read back the goals as you've written them?
- [ ] What are the funding periods (when each part of the funding becomes available)?
- [ ] How long will the plan go for, and when is the next check-in?
- [ ] Is anything missing before you can approve it?
- [ ] Do any budgets show two amounts because of the 2026 changes?
- [ ] Which way of managing the funding suits us: ourselves, a plan manager, the NDIA, or a mix?
- [ ] Can we have a budget breakdown and written reasons for your decisions?

After the meeting

1 Approval and getting started

The planner may approve the plan in the meeting or soon after. You'll get a copy within 7 days, and it appears in the my NDIS portal and app. You'll also be offered a plan implementation meeting, an optional meeting to help you start using the plan.

2 Check the plan

Read the goals, supports and amounts. If something doesn't match what you said, talk to your my NDIS contact or call the NDIS on 1800 800 110. You can ask for a budget breakdown.

3 If you disagree

You can ask for an internal review, a fresh look by someone at the NDIA who wasn't involved, within 3 months of getting the plan. If you still disagree, you then have 28 days to ask the Administrative Review Tribunal for an external review. The 2026 budget reductions can't be reviewed.

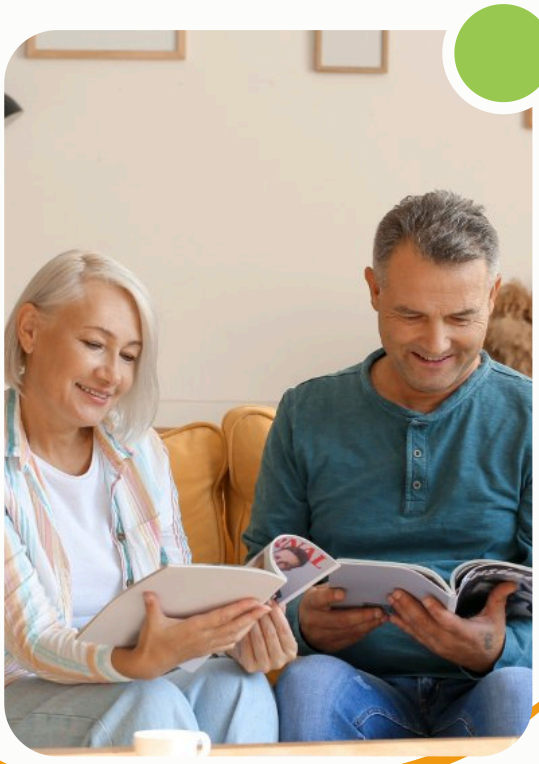
4 Between meetings

Keep your notes and diary for the next check-in. The plan keeps going until a new one is approved. If needs change a lot and stay changed, the person, or their plan nominee or child representative, can ask for a plan reassessment (a new plan).

United Health Professionals

Personal care at home, including complex care.

We support adults at home in Melton, Caroline Springs, St Albans, Sunshine and Deer Park. Ask us every question in this guide. We'd rather you compare.



Personal care

Showering, dressing, grooming and toileting, at home and on your schedule.

Complex care

Talk to us about PEG feeding, catheter care, bowel care or seizure support.

Household tasks

Cleaning, laundry and meals, alongside personal care.

Registered NDIS provider

Check us on the NDIS Commission's provider register.

ABN 69 649 956 776

United Health Professionals Pty Ltd.

Your plan, your say

Support can be paid from your NDIS funding if it's included in your plan.

How to start

1

Call us

Tell us who the support is for, what's needed and where.

2

Talk it through

We go through the plan, the routine and what matters to the person.

3

Meet us

At home or wherever suits, with family there if you'd like.

4

Sign when ready

A service agreement with every support and price, before anything starts.

Questions about support after your meeting?

If you'd like to talk about supports once the plan is approved, give us a call. We're happy to answer your questions.

Call 0416 851 984

info.unitedhealthprofessionals@gmail.com

This guide is general information, not advice about a particular plan. Always follow the person's own support plan and their health practitioner's instructions.