

Tip Sheet for health professionals

Report writing – preparing for a planning meeting

Health professionals may be asked by a NDIS participant to provide a report to help them prepare for a planning meeting. They will often take reports from their general practitioner and allied health professionals with them to a planning meeting. This tip sheet provides some basic information about key elements to keep in mind.

Tip 1 – Remember that the participant's goals & aspirations are key

The NDIS planning process centres around helping a participant develop goals and aspirations. These goals are overarching life goals – to facilitate economic and social participation, and they form the basis of the plan.

It will help your report writing if you collaborate closely with the NDIS participant, so that you are clear about their overarching goals. Your discipline-specific goals will often be 'sub-goals' that fall under these broader goals. In your report, it is best to explain how your therapy plan will help the participant meet their broader goal. At this stage you do not necessarily need to set specific goals, but rather try to help NDIS staff to see where your therapy fit into the participant's plan.

Tip 2 - Use NDIS terminology.

Using NDIS terminology can help avoid misunderstandings, and make sure that your reports are clear. Some of the key terms include:

- Participant
- Service provider
- Goals and aspirations
- Participant needs
- Participant outcomes
- Person centred approach
- Funded supports

Tip 3 – Avoid discipline-specific language

NDIS staff read information from a wide variety of health professionals and sectors. Each of these areas have their own terminology. It is good practice to write reports in a way that anyone could read it and understand it. Examples of discipline specific language include words like mobility, ADLs, aphasia. It is preferable to describe what the participant can do. For example 'Tom can walk short distances', or 'Joan's speech is slurred, but most people can understand her'. If there are technical terms that you need to use, put the meaning in brackets.

Tip 4 – Include a summary

Provide a short summary with key points to make it easy for the participant, their team and NDIS staff. A great way to do this is in a shaded box at the beginning of a report. This could include:

- Participant name and age
- Condition/diagnosis
- Functioning (walking, communicating, daily activities – one sentence each)
- Impact of these on the participant's ability to participate in the community and/or impact that the participant's functional skills have on their life goals and aspirations
- Brief statement of how the therapy you are doing helps the person to reach their broader goals