

First meeting preparation sheet

Fill in only what helps. You can bring this on paper, read it aloud or ask someone you choose to help you complete it.

Participant / preferred name:

Meeting date, place or call link:

People I want involved and their roles:

How I want to communicate, including breaks or access needs:

What I want to be different in everyday life:

My first priority:

Something time-sensitive, and the actual date:

What is already working and should continue:

Current providers / important contacts relevant to this meeting:

Documents I want to discuss (title and date, not every file):

Information I agree can be shared, with whom and for what purpose:

Questions about the coordinator's role, charges or agreement:

Other questions I want answered:

What I would like to leave the meeting knowing:

Optional coordination tool. Not an NDIA form, clinical instruction or funding approval.

Store completed copies appropriately and share only with the people who need them.

Full guide and official sources: <https://www.kinovo.com.au/resources/first-meeting-support-coordinator>

Agreed next-step record

Copy this card for each action. Write 'proposed' until the person has accepted it; a name on a list is not acceptance.

Meeting date / participants:

Priority this action supports:

Decision made, or question still unanswered:

Specific next action:

Person asked to do it:

Acceptance: proposed / accepted on ____ / needs discussion

Agreed needed-by date, if there is one:

Next check-in date:

What completion will look like:

Information, permission or response still needed:

Current document / message location:

Status and date last checked:

People who need this update:

Who will send the summary, and when:

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First meeting follow-up email

Keep only the details the recipients need. Ask for corrections without treating a missing reply as agreement.

Subject: Next steps from our support coordination meeting on [date]

Hi [name],

Thank you for meeting with [me / participant's preferred name].

The priority we discussed was [everyday outcome].

We agreed [decision, if one was actually made].

[Name] accepted [specific action], with [agreed date / next check-in].

[Name] accepted [second action], with [agreed date / next check-in].

Still proposed, awaiting acceptance: [action and person asked].

Still unanswered: [question]. [Name] will clarify this by [agreed date].

We agreed to share [specific information] with [person] for [purpose].

The current document or agreed record is [location].

Please let me know if I have misunderstood anything or an agreed date changes.

Our next check-in is [date / arrangement].

Thank you, [name]

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