

# Prepare the meeting agenda

Agree the purpose with the participant and ask the people needed for this discussion to prepare their part. Add agenda questions and detail as needed.

Care-team meeting for [name or agreed reference] - [date / method / agreed finish time]

What the participant wants this conversation to achieve:

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How they want to contribute / communication support / breaks or another way to give their view:

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People they want involved / purpose of each contribution / information needed from anyone absent:

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Questions for discussion / what we need to understand or decide about each:

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Current information each person agreed to bring / source and date / gaps:

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Who can confirm the relevant information or decision within their role / any authority needing clarification:

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Attendance, preparation or follow-up charges to confirm / person checking the arrangement:

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People who accepted organising, facilitating and note-taking / how the participant will check the summary:

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Draft and final summary readers / agreed sharing method / current copy location:

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Opening: check the purpose, participation preferences and any change to the agenda.

For each question: hear the participant's view; check current information and gaps; explore the options; record what was agreed, deferred or left unresolved.

Before finishing: read back the outcome in a suitable format, check accepted actions and timing, and agree the summary review and next contact.

If a decision is not ready, record what would help and the next accepted information request. Urgent concerns use the appropriate immediate route.

# Record the meeting summary

Record the actual outcome, including no decision yet. Separate the participant's view, suggestions, authority and accepted actions. Keep the summary draft until the agreed checking process is complete.

Meeting / participant or agreed reference / date / people who contributed:

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Summary status and version / person maintaining it / current location:

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Question discussed / participant's view / how that view was checked:

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Information considered / source and date / relevant gaps:

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Actual outcome: decision / accepted action / more information / no decision yet / no action needed

What was agreed or decided / who confirmed it within their role:

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Suggestions, differences of view and questions still unresolved:

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Next action and useful result / person who accepted it, or acceptance still needed:

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Needed or requested timing and reason / separately, accepted commitment or check trigger:

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Missing information / next accepted enquiry / person and fallback contact:

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Who will check this draft / accessible format or method / agreed check point:

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Corrections agreed / unresolved correction labelled / current version shared:

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Agreed readers / suitable sharing method / person sending the relevant information:

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These minutes record the discussion. They do not create representative authority, clinical approval or NDIS funding approval.

## Follow through on an agreed action

Record who accepted the action and its timing, what it is waiting for and the result. A proposed owner or an unanswered message does not establish agreement.

Participant's priority / meeting date or source:

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Specific next action and useful result:

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Proposed owner / accepted by whom and when, or not yet agreed:

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Needed or requested timing and why:

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Accepted commitment / agreed date or event for the next check:

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Information, authority or permission needed first / who is checking:

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Status: proposed / accepted / waiting / completed / changed

If waiting, what is missing / person who can answer / agreed fallback:

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Next follow-up / person who accepted it / check date or trigger:

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If the owner cannot continue, revised agreement and who confirmed it:

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Actual result / relevant current document / completion checked on:

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Who needs the result / how it was shared / participant's feedback and any new action:

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