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Step 1: Think about your support needs

We want to make sure your plan meets your support needs. Thinking about your needs before your plan meeting is a great way to speak up for yourself and be prepared.

The kinds of things you can think about are:

Your day-to-day needs

Think about the areas you need the most support with in your daily life. For example, cooking, dressing or getting around the house. Think about what might make your life easier.

Your network

Think about who is part of your support system and if someone can help you.

Your goals

It can be helpful to write down some draft goals before your first plan meeting. You can work with your NDIA planner to clarify your goals during the meeting.

Learn more about how to set goals.

How you'd like to manage your plan

There are 3 options to choose from:

1. self-management: you manage your own plan
2. plan-management: a plan manager manages your plan
3. NDIA-management: the NDIA manages your plan.

You can also choose a mix of these options. For example, you may want to manage the funding for some supports and we'll manage the rest.

Learn more about managing your plan.

Step 2: Prepare any new information or evidence

We'll work with you to know what information you should bring to share with us at your plan meeting.

> **Tip**: **Sharing your information before the meeting can speed up the process.**
>
> This can help us approve your plan faster. You're also free to bring this information to your plan meeting.

Step 3: Decide if you want to bring someone

Some participants find it helpful to bring someone who knows them well to their plan meeting.

This can be:

- a family member
- a friend
- support coordinator or recovery coach.

Step 4: Attend your plan meeting

You can choose to have your plan meeting:

- in person
- virtually on a computer using Microsoft Teams
- by phone.

Make a note of the following details:

- time
- date
- place of the meeting.

> **Tip: How to prepare for a phone or virtual meeting.**

Find somewhere quiet where you won't be disturbed for up to an hour. Make sure your phone is charged and you're somewhere with good signal.

What your NDIA planner will talk to you about

- your goals and support needs
- how your plan was created
- the NDIS supports included in your plan
- how you'd like to manage your funding
- how long your plan will be in place.

It's okay to ask the person running your plan meeting to stop, repeat or explain things.

We'll write down important information. You might also like to take notes so you can look at them later.

Step 5: After your plan meeting

We can make reasonable and necessary changes to your draft plan based on our conversation.

We may need you to give us more evidence before we can approve these changes. We'll let you know what evidence you'll need to provide.

We can sometimes approve your plan during your plan meeting. We aim to get all plans approved within 56 days.

We'll send you a copy when we approve your plan.

We'll offer you a plan implementation meeting

We'll help you get started after you receive your approved plan.

A plan implementation meeting will help you understand how to use your funding and how to access NDIS supports.

We recommend you have a plan implementation meeting when:

- it's your first NDIS plan
- your plan has had a big change since your last NDIS plan.

Related information

What is a plan meeting

What are goals

How to set goals

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