

# Your plan meeting



## This fact sheet will explain:

- what a plan meeting is
- what to think about before your plan meeting
- what to expect during your plan meeting
- what happens after your plan meeting.

## What is a plan meeting?

Your plan meeting is a conversation with the planner who approves your plan. You'll have a plan meeting when we create your first plan, or when we change your plan in a plan reassessment or plan variation.

Before your plan meeting, we'll create a draft budget based on the information you've already given us.

- For your first plan, we use the information we talked about when you applied to the NDIS
- When we do a plan reassessment or plan variation, we use the information we talked about in your check-in or when you asked us to change your plan.

Then, in your plan meeting, we'll explain how we created your draft budget. We'll talk about whether the draft budget meets your needs, and any changes we might need to make before we approve your plan.

Your plan is personalised and directed by you. We want to make sure your plan meets your disability support needs. If you have any questions about your plan and how it will meet your needs, you should ask the planner during your plan meeting.

To learn more, read [Our Guideline – Creating your plan](#) on the NDIS website.

## What to think about before your plan meeting

### Do you want to bring someone to support you in the meeting?

You can bring a friend, a family member, an advocate, your support coordinator, or anyone else you want to support you.

### How do you want to manage your funding?

You can learn about the ways you can manage your funding in [Our Guideline – Creating your plan](#) on the NDIS website. Think about what option, or mix of options, will work best for you.

### How long would you like your plan to go for?

We'll try to make your plan the length you want. You can see how long we'll normally make your plan in [Our Guideline – Creating your plan](#) on the NDIS website.

### Do you have your bank account details?

If you might self-manage your funding or receive recurring transport funding, we'll need your bank details so we can pay you. If you want to set up a separate bank account to manage your NDIS funding, you should do this before your plan meeting.

### Have your goals or disability support needs changed?

If something has changed since we last spoke about your support needs, you should contact us. This means we can include the right supports in your draft budget and approve your plan faster.

### Do you have any new information or evidence you want to give us?

We'll work with you when you apply to the NDIS or during your check-in to understand what information we need from you.

You can contact us to give us this information before your plan meeting. This can help us approve your plan faster. Or you can bring the information we need to the plan meeting.



## What to expect during your plan meeting

In your plan meeting, we'll talk about:

- your goals and information about you. For example, your living situation and your informal, community and mainstream supports.
- how we've made our decisions to create your draft budget
- the supports included in your draft budget
- any supports you've asked for that aren't included
- how you'll manage your funding
- how long your plan will go for.

Based on our conversations, we can make reasonable and necessary changes to your draft budget. We may need you to provide more evidence before we can approve these changes. In this case, we'll let you know what evidence you'll need to give us.

If we can, we'll approve your plan during your plan meeting. Sometimes this might take longer. For example, if we need to make significant changes to your draft budget after our conversation, if you've given us new evidence during the plan meeting, or if we need more evidence from you before we can approve supports you've asked for.

We aim to approve your plan within 56 days, or within 90 days for a child under 9.

## What happens after your plan meeting

After your plan meeting, we will:

- approve your plan, if we can't do this during your plan meeting. We'll let you know how long it's likely to take.
- send you a copy of your plan by your preferred communication method
- contact you to arrange a plan implementation meeting, if you want one.



# Notes



**Fact sheet – Your plan meeting**

For more information visit [ndis.gov.au](https://www.ndis.gov.au)

## National Disability Insurance Agency



Website: [ndis.gov.au](https://www.ndis.gov.au)



Telephone: 1800 800 110



Webchat: [ndis.gov.au](https://www.ndis.gov.au)

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