



FREE GUIDE

Your NDIS planning meeting: how to prepare

Goals, a typical week, informal supports, plan management and the questions worth asking.

Your planning meeting is a conversation with the NDIA planner who approves your plan. They will already have drafted a plan from your application. The meeting is where you check it fits the life you actually live.

This guide was checked against [ndis.gov.au](https://www.ndis.gov.au) in October 2026. Planning is changing under new laws, with a new way of planning starting from 1 April 2027, so check the current process on [ndis.gov.au](https://www.ndis.gov.au) for your situation.

What the planning meeting is

The meeting is with an NDIA planner. They show you the plan they've created, explain how they used your information and evidence, and check they understand your situation. You can have it in person, by phone or on Microsoft Teams, and you can bring a family member, friend, support coordinator or recovery coach.

If you give new information or evidence in the meeting that means you need more, less or different supports, the planner may change your plan then and there. They aim to approve it during the meeting or soon after.

NDIS partners, including early childhood partners, don't approve plans, decide supports or allocate funding. That's the NDIA planner's role.

Five things to prepare

- **Your goals.** You need at least one goal, in your own words. Small and short-term is fine. 'Cook dinner for myself twice a week' is the kind of example the NDIA uses.
- **A typical week.** Map Monday to Sunday, morning to night: what you do, who helps, how long it takes and what's hard. Include the harder days, not only the good ones.
- **Your informal supports.** Who helps now, with what, and how often? Is that help sustainable? Your plan records your situation and who supports you.
- **Recent evidence.** Bring recent reports, assessments and any quotes for equipment. The planner may not be able to fund a support without enough information.
- **How you want it managed.** Self-managed, plan-managed, NDIA-managed, or a mix. Have a preference ready. See the three options below.

One thing to know about goals: they help inform what's in your plan, but they don't link directly to funding. Setting more or bigger goals doesn't mean more funding. [How to set goals, from the NDIA.](#)

Three ways to manage your plan

This decides who pays your providers and keeps the financial records. You can mix them across your plan, and ask to change later.

- **You manage it.** You, your nominee or representative pay providers and keep the records. It gives the most flexibility and choice. Self-managed participants can use registered or unregistered providers.
- **A plan manager manages it.** A registered plan manager pays your providers, keeps records and reports on spending. Funding for the plan manager is included separately in your plan. You can use registered or unregistered providers.
- **The NDIA manages it.** The NDIA pays your providers and keeps the records. You can choose your providers, but they must be registered NDIS providers.

From 1 October 2027, plan managers will need to come from a government-approved panel. If yours isn't on it, you'll have 6 months to move. And from 1 December 2026, participants or their plan managers need to make claims within 90 days of a support being delivered. [Read the details.](#)

Questions worth asking

Write these down and take them with you. It's fine to ask the planner to slow down or explain again.

- How did you work out the funding in each budget?
- Which supports are flexible and which are stated?
- What are my funding periods, and how much becomes available in each?
- Have budget reductions been applied to any of my supports?
- What evidence would you need to fund the support I've asked for?
- When is my plan reassessment date, and when will my check-in be?
- Who is my NDIS contact, and how do I reach them?
- Can I have a plan implementation meeting to get started?

Planners talk you through your budgets, how your plan will be managed, recording your providers, consent for providers to see your plan, and using the my NDIS portal and app.

After the meeting

- **Find it in the portal and app.** Once approved, your plan appears in the participant portal and the my NDIS app, and you can start using it straight away.
- **Plan implementation meeting.** The NDIA offers one within 7 days of approving your plan, to help you start using it. You can ask for one later too.
- **If you disagree.** Ask the NDIA to explain the decision. If you still disagree, ask for an internal review within 3 months of receiving it.

Bring a clear picture of your week

Kinship is a registered NDIS provider (4-GWVHCEY). We don't attend planning meetings on the NDIA's behalf or decide anything about your plan. If you already use Kinship, we can talk with you about how your current supports are going before your meeting, so you go in with a clear picture of your week.

Because we're registered, we can work with NDIA-managed, plan-managed and self-managed participants.

- **Daily living and personal care.** Help at home with the routines that make a day work.
- **Community participation and life skills.** Getting out, trying things and building skills, with the same worker every visit.
- **High intensity support.** Complex bowel care, catheter care, wound care, PEG feeding, medication management, dementia and behaviour support.



Your planning meeting checklist

- ☐ Write at least one goal in your own words, plus a short-term step towards it
- ☐ Map a typical week, morning to night, including harder days
- ☐ List the help family and friends give, how often, and whether it can continue
- ☐ Gather recent reports, assessments and any equipment quotes
- ☐ Decide how you'd like your plan managed: self, plan or NDIA, or a mix
- ☐ Write down the providers you already use
- ☐ Write your questions for the planner
- ☐ Choose a support person to come with you, if you'd like one
- ☐ Choose in person, phone or Microsoft Teams
- ☐ After the meeting: book your plan implementation meeting

Questions people ask

Can I bring someone to my planning meeting?

Yes. The NDIA says you can bring a family member, friend, support coordinator or recovery coach.

Is my plan approved at the meeting?

The planner will approve your plan in the meeting if the supports fit your situation, or soon after. It can take longer if they need more information or an assessment.

Do bigger goals mean more funding?

No. Goals help the planner understand what supports you might need, but they don't link directly to funding, and setting more or bigger goals doesn't mean more funding.

Can I change my goals later?

Yes. The NDIA can change the goals in your plan without creating a new plan.

Can I change how my plan is managed later?

Yes. You can ask to change your management type at any time. You don't have to wait for a new plan.

Can I use unregistered providers?

If your funding is self-managed or plan-managed, you can use registered or unregistered providers. NDIA-managed funding can only be used with registered providers. From 1 July 2027, registration becomes mandatory for providers of some higher-risk supports, such as personal care and daily living supports, rolling out to the end of 2030.



Talk to a real person. Call Kinship Uniting Services on **0437 733 744** or email info@kinshipunitingservices.com. Deaf, or have a hearing or speech impairment? Contact us through the National Relay Service: Speak & Listen 1300 555 727, TTY 133 677, SMS relay 0423 677 767.

Sources

NDIS: What is a plan meeting –

<https://www.ndis.gov.au/participants/creating-plan/understanding-plan-meeting/what-plan-meeting>

NDIS: Guide to your first plan –

<https://www.ndis.gov.au/participants/creating-plan/creating-your-first-plan/guide-your-first-plan>

NDIS: What are goals – <https://www.ndis.gov.au/participants/creating-plan/preparing-your-plan-meeting/what-are-goals>

NDIS: How to set goals – <https://www.ndis.gov.au/participants/creating-plan/preparing-your-plan-meeting/how-set-goals>

NDIS: What is an NDIS partner – <https://www.ndis.gov.au/understanding-ndis/people-help-you/what-ndis-partner>

NDIS: Guide to your management options –

<https://www.ndis.gov.au/participants/using-your-funding/plan-implementation-meeting/guide-your-management-options>

NDIS: What is self-managed funding –

<https://www.ndis.gov.au/participants/using-your-funding/self-managed-funding/what-self-managed-funding>

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NDIS: What is NDIA-managed funding –

<https://www.ndis.gov.au/participants/using-your-funding/ndia-managed/what-ndia-managed-funding>

NDIS: Guide to NDIS support budgets –

<https://www.ndis.gov.au/participants/using-your-funding/ndis-support-budgets/guide-ndis-support-budgets>

NDIS: What is a decision review –

<https://www.ndis.gov.au/participants/changing-your-plan/decision-reviews/what-decision-review>

Department of Health, Disability and Ageing: About the changes to the NDIS (updated 2 October 2026) – <https://www.health.gov.au/our-work/ndis-legislation-changes/amendments/ndis-amendment-securing-the-ndis-for-future-generations-bill-2026/about-the-changes-to-the-ndis?language=en>

Department of Health, Disability and Ageing: Securing the NDIS for future generations timeline (updated 15 September 2026) – <https://www.health.gov.au/resources/publications/securing-the-ndis-for-future-generations-timeline-0?language=en>

NDIS: Summary of legislation changes –

<https://www.ndis.gov.au/ndis-laws/getting-ndis-back-track/summary-legislation-changes>