

Tips for you over the phone NDIS planning meeting



With COVID lots of NDIS planning meetings are being held over the phone and this is something that will be in place for some time. So, it's time to get ready for your meeting

Before the phone meeting?

It is worth reviewing the [NDIS Planning Booklet number 2](#), which has some great tips

- Before your call ensure you have any reports or assessments with you. If possible, send them to your ECEI partner, LAC or NDIA Planner before the call
- In the Planning Booklet there is a great form to fill in "Getting ready for your planning meeting" These details can be used to start a conversation with your ECEI Coordinator, LAC or NDIA Planner
- The NDIA will contact you by phone to undertake your plan review and will discuss the option of having your plan in place for 24 months?
- You don't need to do anything if your plan is going to expire, it will be automatically extended for 12 months if the NDIA haven't been able to complete a plan review

- The NDIA will guide you through the planning process, but take notes and ask any questions you have along the way
- Make sure you know what the next steps are before ending the call ie will I receive an updated plan?
- If you choose to use a Plan Manager, this will be funded in you plan. They will pay your providers for the supports you purchase, help you keep track of your funds and do any financial reporting for you



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