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Plan management is when a provider supports you to manage funding in your NDIS plan. These providers are known as plan managers.

Plan management is different from having the NDIA manage funding in your NDIS plan, or you choosing to self-manage your plan. More information on [ways to manage your funding](#).

NDIS Guide to Plan Management

To help you understand plan management, we have released the NDIS Guide to Plan Management, with an Easy Read translation:

- [NDIS Guide to Plan Management \(PDF 3.6MB\)](#)
- [Easy Read - NDIS Guide to Plan Management \(PDF 7.1MB\)](#)

This guide will help you to understand:

- what to expect from plan management
- the roles, responsibilities and activities of plan management providers
- the broader system plan management providers operate under.

Why use a plan manager?

A plan manager can help you:

- increase your financial and plan management skills
- learn how to self-manage your plan
- pay providers
- increase your choice of providers
- get NDIS plan budget reports and greater budget oversight.

How can I have plan management?

At your planning meeting you can tell NDIS staff that you would like a plan manager to support you.

The NDIS will include funding in your plan to pay for your plan manager. This is separate from your other services and supports in your budget.

If you are mid-plan and want to change, contact us on 1800 800 110 to discuss how you can include plan management in your plan.

How do I find and connect with a plan manager?

You can find and connect with a plan manager through:

- your Local Area Coordinator, early childhood partner or support coordinator
- the Provider Finder tool on the [NDIS myplace participant portal](#)
- your friends and family
- other online resources and websites.

After I have connected with a plan manager, what do I do?

Once you have connected with a plan manager, you should create a [service agreement](#).

A service agreement outlines:

- the services to be provided
- how these services will be provided
- how long they will be your plan manager.

How do I change plan managers?

You can choose your plan manager. You can also change your plan manager during your plan.

If you wish to change, you will need to tell your plan manager. They will provide you with information about your plan and help you to change.

Complaints and feedback

If you have a complaint with the service of your plan manager, start by having a discussion with your plan manager. They may be able to resolve the issue.

If you are not happy with that outcome or you do not want to discuss the matter with your plan manager, you may lodge a complaint with the [NDIS Commission](#).

Frequently asked questions

Should a plan manager advise you when NDIS funds are low?

Yes, a plan manager should provide regular reports and statements to you directly.

When a plan manager has identified overspend or underspend, the plan manager should advise you as soon as possible, regardless of reporting frequency.

Should a plan manager advise a provider when NDIS funds are low?

No, a plan manager should contact you directly.

This will allow you to contact your provider, support coordination provider or partner in the community, to discuss current service delivery arrangements and make any required amendments.

How long should it take a plan manager to pay a provider?

A plan manager should arrange for prompt payment to a provider or prompt reimbursement to you.

The NDIA expects a plan manager to validate an invoice and submit a payment request to the NDIA within five business days of receipt.

Upon receiving payment from the NDIS, the NDIA expects payment or reimbursement to occur within two business days.

Should my plan manager claim all plan funds at the start of my plan?

No, a plan manager can only submit claims for supports and services after they have been provided.

Once an invoice or receipt has been issued and sent to a plan manager, they will make a claim for that amount from the NDIS.

All plan funds remain with the NDIS until a plan manager submits a claim for that amount.

Should invoices for supports and services include the provider's ABN?

Yes. If your provider is registered for an ABN, their invoice must display a valid ABN.

If you are providing an invoice without an ABN to your plan manager, your provider must complete the ATO's Statement by a supplier not quoting an ABN form.

Should a plan manager help to determine whether supports or services are 'reasonable and necessary'?

No, the role of a plan manager is not to determine whether the supports or services purchased are 'reasonable and necessary'.

Your plan will have funds approved for reasonable and necessary supports at the planning stage.

The role of the plan manager is to ensure your plan is implemented as intended. This includes ensuring funds are being spent in accordance with your plan.

Why do plan managers operate differently to each other? Why isn't there a set of standards to follow?

Plan managers are expected to follow payments and price controls established by the NDIA.

Plan managers are also expected to follow the service expectations set out in the NDIS Guide to Plan Management. The guide does not prescribe what services a plan manager should provide, so the services offered may vary.

Who is responsible if a provider submits an invoice to a plan manager and there are not enough funds available?

Plan managers should work with you to reduce any potential for plan overspend. This will involve regular reporting of plan managed budgets as outlined in the NDIS Guide to Plan Management.

Your plan manager should discuss with you effective and efficient ways to utilise approved funds.

If your NDIS plan funds are being spent faster than anticipated and there is a risk that funds will be exhausted before your next review, your plan manager should discuss this with you.

If you require additional funding (for example, due to a change in circumstances), contact us to discuss your options.

Who is liable to repay any amounts that are not spent in accordance with your plan?

Inappropriate use of government funds or fraud are serious matters.

A plan manager may be liable to repay any amounts which have not be spent in accordance with your plan.

For more information see the [Provider Payment Assurance Program](#).

Why can't a provider be advised of the allocated plan management funds in my plan?

Providers should work closely with you to develop a service agreement. The service agreement should outline how and when the supports will be delivered.

Your plan manager should report regularly to you on your plan spending. This reporting will help you to keep providers advised.

If I change plan manager, who is responsible for paying my 'old' invoices?

If you change your plan manager, the new plan manager becomes responsible for the ongoing management of your plan.

This includes, to process payments on your behalf, irrespective of the date the services were rendered or the invoice date. This is to ensure that any late invoices issued by a provider from earlier in the plan period are able to be paid.

The NDIA expects payments of this kind will only be required in special circumstances.

What is the difference between a plan manager and a support coordinator and a partner in the community?

A plan manager will pay providers for supports delivered. A plan manager will help you monitor your funds, and provide financial reporting.

A support coordinator will support you to understand and implement supports included in your plan. A support coordinator will link you to providers and other community and government services. A support coordinator will also support you to build skills and direction.

An NDIS Partner in the Community delivering [Local Area Coordination](#) or [early childhood services](#) may provide plan implementation and monitoring support to you. Partner organisations are appointed by the NDIA to help you understand the NDIS, and find providers of support suited to your needs.

Can I pay my providers more than the limits set in the NDIS Pricing Arrangements and Price Limits?

No. If you are using a Plan Manager, providers cannot charge more than the price limits outlined in the [NDIS Pricing Arrangements and Price Limits](#).

What other costs can plan managers charge?

From 1 July 2020, plan managers can claim for supports not delivered in person. This includes travel costs incurred to deliver supports.

More information is in the [Pricing Arrangements and Price Limits](#).

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