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Step 1: Review your plan

Your plan will describe which of your support budgets are plan-managed.

For example, if your core supports are plan-managed, this section of your plan will say:

‘This funding is plan managed’.

A registered plan manager will help you to manage this funding.

Check your plan manager funding

We’ll include funding in your plan for a plan manager if you have plan-managed support budgets.

Your plan manager funding is in your capacity building supports budget. It’ll include the dollar amount and say:

‘Supports to help you manage your plan funding and pay for services using a registered plan manager’.

Your plan manager funding is a stated support. This means you can only use this funding to pay for plan management.

Step 2: Choose a plan manager

You can choose who your plan manager is. They must be registered with the NDIS Quality and Safeguards Commission .

Finding a plan manager

To help you find a plan manager, you can:

- use our provider finder
- ask for advice from people you trust, including your family and friends
- do your own research online
- ask for a referral from your my NDIS contact, support coordinator or recovery coach.

Connect with your plan manager

You need to have a meeting with your plan manager once you choose one. At your first meeting, talk to your plan manager about:

- what NDIS supports you need
- how much funding you have for your NDIS supports
- how to pay your providers
- how to keep track of your NDIS funding
- how often they'll provide you with a plan manager report
- how much they'll charge you
- the consent you'll give them to access your plan
- if they have any conflicts of interest, like financial or personal relationships with other providers who deliver NDIS supports.

Step 3: Create a service agreement

You need to create a service agreement with your plan manager. It'll explain:

It will explain:

- the supports they'll deliver
- how they'll deliver them
- for how long
- how much those supports will cost.

Step 4: Record your plan manager as a my provider

All plan managers must be recorded as my providers to be paid.

You can do this in the my NDIS participant portal. You can also tell us at your plan meeting, or by calling us on 1800 800 110.

Your plan manager can send you a new relationship request via the portal. You can accept or decline this request under the 'relationships' tab in the my NDIS participant portal.

Step 5: Choose your providers

You can still choose the providers you want to deliver your NDIS supports. You can choose providers who are registered or unregistered. You can also negotiate the price of your NDIS supports.

You let your providers know who your plan manager is to send their invoices to.

Step 6: Work with your plan manager

You're responsible for managing the services you receive and the relationship you have with your plan manager. You need to talk to your plan manager to resolve any issues if you're unhappy with them.

You can lodge a complaint with the NDIS Quality and Safeguards Commission if you're not happy with the outcome of your conversation.

Changing your plan manager

You can change your plan manager anytime during your plan. You need to tell your plan manager before you make changes.

Step 7: Track your spending

You're still responsible for knowing how much of your funding you've spent and only purchasing NDIS supports that are in line with your plan.

You need to make sure you check your budgets regularly to keep track of your funding. You can check your NDIS funding balance at any time by signing into participant portals or my NDIS app.

You can ask for help at any time to understand your funding and build your skills and confidence to manage your plan.

Your plan manager should give you a report every month telling you:

- how you have used your NDIS funding
- how much NDIS funding you have left
- if you're using your NDIS funding too quickly or too slowly.

Related information

What is plan-managed funding

How to give consent

What is a my provider

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