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Roles and responsibilities of a plan manager

A plan manager's role is to help participants by managing their NDIS funding.

Their role relates to plan managed NDIS supports in a participant's NDIS plan. It doesn't include support with day-to-day administration or management of the whole plan.

Plan managers help participants manage their funding so it's spent:

- in line with their plan
- on NDIS supports.

Learn more about how plan managers support participants.

A plan manager isn't responsible for helping participants find and connect with providers or community and mainstream supports.

Financial administration

The main role of a plan manager is financial administration. They also check claims meet NDIS integrity and compliance requirements.

Plan managers:

- keep track of a participant's NDIS spending
- process invoices
- pay providers
- keep records of how a participant's funds are spent.

Connect with participants

Participants choose their plan manager

Participants choose their plan manager. Participants can find a plan manager:

- using the provider finder tool
- with help from their support coordinator or recovery coach
- by asking friends and family
- using other online resources and websites.

Make a service agreement

The service agreement outlines:

- what a plan manager will do
- how a plan manager will support the participant
- plan management fees.

Any plan management fees should line up with the NDIS pricing arrangements and price limits.

Learn more about how to connect with participants as a plan manager.

Access the provider portals

Plan managers need to use the my NDIS provider portal and the myplace provider portal to access participant's plan and budget information.

Learn more about how to use the provider portals.

How to get paid

Plan managers can only submit claims when they're connected to a participant and recorded in our system and recorded in our system as the participant's plan manager.

Once recorded, plan managers can submit claims for any period in the participant's plan, provided they meet NDIS integrity and compliance requirements.

Plan managers need to use the myplace provider portal to submit all claims for payment. learn more about what how to get paid.

Plan managers need to be recorded as a my provider in the my NDIS provider portal to be paid. Plan managers listed as my providers will generally be paid in 2 to 3 business days.

Learn more about how to be recorded as a my provider.

You can also find more information if you need help to troubleshoot claims and payments.

Guide to plan management

The guide to plan management explains:

- the principles of plan management
- how participants and plan managers work together
- plan management activities.

Download the guide to plan management:

- Guide to plan management (PDF 3.6MB)

Download the guide to plan management in Easy Read:

- Guide to plan management (PDF 7.1MB)

Related information

How to connect with participants as a plan manager

How to support participants as a plan manager

How to use the provider portals

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