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Step 1: Participants choose their preferred plan manager

Participants choose the plan manager they want to work with. Participants who need to choose a plan manager or want to change plan managers are encouraged to explore the open market.

Participants can find a plan manager by:

- a referral from a support coordinator or recovery coach
- getting recommendations from friends and family
- using the NDIS provider finder
- exploring other online resources and websites, such as the NDIS Quality and Safeguards Commission .

Participants then approach their preferred plan manager directly.

Step 2: Connect with participants through the portals

You'll need access to the provider portals after the participant chooses you as their plan manager to access their NDIS plan and budget information.

Working in the my NDIS provider portal

You'll need to be recorded as the participant's plan manager in the my NDIS provider portal before starting services.

You'll also need to be recorded as a my provider for these participants. This is so you can access their information and be paid.

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

Working in the myplace provider portal

A service booking must be created before participants with plans in the myplace provider portal receive services or supports.

You can create a service booking in the myplace provider portal.

Learn more about how to use the provider portals.

You should verify the participant or authorised representatives once you've connected with them and before talking about any plan information. You can do this by using a minimum of 3 personal identity documents from their my NDIS portal account.

Participant consent and accessing plans

Participants need to give consent for their chosen plan manager to access information about their plan. This is needed for you to perform your role as a plan manager.

Consent to access the participant's plan and budget information is automatically applied after participants choose their plan manager and they're recorded as a my provider in the my NDIS provider portal.

Learn more about how to view plans in the my NDIS provider portal.

Step 3: Service establishment

There needs to be a strong understanding between you and your participant to work effectively together.

You need to understand the participant's NDIS experience, knowledge of the NDIS and their spending history.

Service establishment has many benefits. This includes helping plan managers to:

- get things right from the start by setting clear expectations
- reduce the likelihood of error, non-compliance and disputes
- provide budget monitoring, reducing the risk of overspending
- highlight important documents, including the service agreement and NDIS plan
- make sure conflicts of interests are declared and managed
- work out an agreed process for receiving and managing invoices from approved providers.

Create a service agreement

It's important to create a service agreement once connected with a participant. This agreement makes it clear what you've each agreed to and what to do if you disagree.

The service agreement outlines the:

- services to be provided by you as the plan manager
- duration of the services
- fees involved
- roles and responsibilities of you and your participant
- the way to resolve any problem
- preferred communication methods
- process if either you or the participant wants to change or cancel the plan management services.

You're ready to support your participant after you've connected with them as their plan manager.

Learn more about how to support participants as a plan manager.

Related information

What is a my provider

How to be recorded as a my provider

How to view plans in the my NDIS provider portal

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