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Step 1: Understand your participant's plan

Make sure funds are spent in line with the plan

Plan managers must make sure NDIS funds are spent in line with the participant's plan and on NDIS supports.

It is important to understand:

- what an NDIS support is
- what is not an NDIS support
- what a replacement support is

Learn more about [support types and funding categories](#).

Step 2: Understand your tasks as a plan manager

As a plan manager, your tasks to support participants include:

- having an establishment or set up meeting with them
- financial administration of their plan
- keeping track of their budgets
- assessing and submitting claims, processing invoices and paying providers
- making sure each claim is in line with their plan, budget and NDIS supports
- making sure they're aware of and approve claims
- keeping records of how NDIS funding is spent
- making sure each claim meets NDIS compliance requirements
- helping to resolve payment disputes.

Step 3: Pay service providers

As a plan manager, you'll pay invoices for NDIS supports on a participant's behalf.

You need to consider the price limits within the [NDIS pricing arrangements and price limits](#) before paying providers.

Use the myplace provider portal to submit a [claim for payment](#) after providers have delivered the service.

It's important you ask your participants for authorisation when managing claims and paying providers.

You should pay providers or reimburse participants in a timely manner. This should be within 2 business days of you receiving payment from the NDIS.

Step 4: Prepare monthly reports and statements

Plan managers must provide participants with a monthly financial statement. This helps keep participants informed about their plan spending.

Monthly financial statements should include:

- how much of their NDIS plan has been spent
- whether the amount spent is consistent with expectations for the funding period, components and total plan
- the remaining balance of funds in their plan
- any concerns about overspending of NDIS funds, where required.

Plan managers need to let participants know if their spending is not on track.

Plan managers may also need to [prepare reports](#) and statements when participants choose to change plan management providers and for [plan reassessments](#).

Step 5: Help participants change plan managers

Participants can choose to change their plan manager at any time.

Plan managers should help participants move to a new plan manager if they want to.

The current plan manager can submit claims for any period, including supports delivered when they weren't the plan manager. Any claims submitted by the previous plan manager will be rejected, even if they were the plan manager at the time the supports were delivered. The previous plan manager should forward any outstanding invoices to the new plan manager for processing.

If participants want to change or remove their plan manager, they need to let us know. They can do this by:

- speaking with their my NDIS contact
- calling the National Contact Centre on [1800 800 110](tel:1800800110)
- submitting an enquiry through our [service hub](#) .

If a plan manager wants to end their relationship with a participant, this can be done in the provider portals. Plan managers need to give participants 28 days notice. This should be outlined in the service agreement. They also need to continue to meet their obligations until the relationship ends.

Related information

[Guide to NDIS support budgets](#)

[Pricing arrangements and price limits](#)

[Guide to report writing](#)

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