

The Role of a Plan Manager

What is a Plan Manager?

Plan Management is a service funded through the NDIS, aiming to assist and support participants to manage their NDIS funding.

A plan manager can support participants by:

- Managing and monitoring a participant's budget.
- Managing a participant's NDIS claims and paying providers for services delivered.
- Providing regular statements to a participant to show the financial status of their plan, including prompt notification of over or under utilisation.
- Offering increased choice and control to a participant over plan implementation and utilisation.
- Giving advice about how to best utilise their NDIS plan funding which can assist in building a participant's financial capacity and knowledge.

All plan managers are required to be registered with the **NDIS Quality and Safeguards Commission**. Plan managers must ensure that the participant's plan is being implemented **as intended by the NDIA**, which includes ensuring that funds are being spent in accordance with the plan and in line with expected plan spend. Plan management providers must follow the **NDIA guidelines**, and ensure that invoices are compliant with [ATO Tax invoice rules](#) and the [NDIS Price Guide](#).

Therefore, plan managers do not have the authority to:

- Determine whether supports or services are deemed 'reasonable and necessary'. **The participant's NDIS Plan will have funding included for the reasonable and necessary supports that have been approved by the NDIA.**
- Decide what supports a participant can access.
- Pay an invoice for a support that exceeds the relevant price control, regardless of whether a provider seeking payment is a registered or non-registered provider.
- Claim funds from a service booking prior to supports and services being delivered to a participant. **Plan managers can only make a claim once a support has been delivered, and an invoice has been raised. Any invoices received for payment that include a future dated support will be held for processing until that date has passed.**

PLEASE NOTE: Inappropriate use of government funds or fraud are serious matters.

A plan manager may be liable to repay any amounts which have not been spent in accordance with a participant's plan.

What happens if I am overspending my NDIS funds?

Specialised Plan Management will notify you if you're spending your NDIS plan funds faster than anticipated and there is a risk that funds will be exhausted before your next scheduled review date. [Click here](#) for more information about what to do if you need additional funding (for example, due to a change in circumstances).

Specialised Plan Management provides a monthly budget statement that shows the year to date spend for each participant's plan. This makes it easy for the participant or the nominated representative to view the balance of funding left within the current plan.

Important Information for Users of Non-registered Providers:

All NDIS Providers – registered or non-registered – are required to comply with the NDIS Code of Conduct and the NDIS Price Guide. The NDIS Commission can manage complaints about supports and services delivered by non-registered providers. If a provider that is not registered does not comply with the NDIS Code of Conduct, the NDIS Commission can take a wide range of actions against that provider.

[Want to know more? – Feel free to contact us!](#)

For information about our Plan Management services, call 3317 8344.

For information about our Support Coordination services, call 3317 8309.