



155 Queen Street, Warragul, 3820

E: info@custodia.com.au

1800 002 062

WHAT IS PLAN MANAGEMENT?

- 1. Agency Managed:** The NDIA holds the funds and pays providers through the NDIS Portal. This means that the supports you use will have to be registered with the NDIS.
- 2. Self Managed:** NDIS participants/nominees receive invoices directly (in arrears) & then are responsible for ensuring timely payment. They can either pay the invoice first & then claim reimbursement via the NDIS portal or claim the invoice amount from the NDIA on the portal and then pay after receiving the funds.
- 3. Plan Managed:** A financial intermediary (i.e. an accountant or bookkeeper) manages the Plan. Providers invoice the Plan Manager.
- 4. A combination of the above.**

WHAT DOES A PLAN MANAGER DO?

Plan Management is, in its essence, a financial intermediary function. As a minimum, a Plan Manager is responsible for:

- Receiving invoices:
 - * Directly from provider
 - * Via participant
- Claiming from NDIS Portal
- Paying Invoices
- Providing monthly statement to participant including:
 - * Summary of expenditure
 - * Breakdown of budget totals remaining

WHY WOULD A PARTICIPANT WANT TO USE A PLAN MANAGER?

Participants who choose Plan Management have a few distinct advantages:

- You can buy supports from non-NDIS registered providers (like Jim's Mowing, local community members or organisations and therapists who have chosen not to register).
- You don't have to use the NDIS Portal.
- You have a partner in navigating the NDIS and someone to help you make the most of your Plan.
- You have most of the choice and control of Self Management without the administrative burden.

HOW MUCH DOES PLAN MANAGEMENT COST ME?

As a participant to NDIS, Plan management does not cost you anything. The Plan Management fees are built into your plan as a separate category called Improved Life Choices (CB Choice and Control). The Plan Manager will claim a set up cost at the start of your plan as well as a monthly fee for financial administration.

Plan Management is always included in the plan in addition to other supports. Plan Management does not come at the expense of any other supports.

CAN PARTICIPANTS GET FUNDED FOR PLAN MANAGEMENT EVERY YEAR?

Yes, if they want it.

WHEN IS THE PLAN MANAGER CHOSEN?

At the planning meeting a participant will specify their preferred mode of funds management. They may elect a particular Plan Management provider at this stage or the participant and/or their nominee can make this decision once the plan is approved (may be with assistance from Support Coordinator).

WHAT ARE THE BENEFITS TO ORGANISATIONS IN PROVIDING PLAN MANAGEMENT?

Plan Management is a support that requires staff to understand the NDIS inside and out and support participants to get great outcomes from their individualised funding.

Plan Management is designed to be ongoing, meaning that organisations can grow Plan Management services that can support participants to reach these outcomes for years to come.

For more information please call:

1 800 002 062

