

# Plan Management

An Easy Read guide for you

**Easy Read**



## How to use this guide



The National Disability Insurance Agency (NDIA) wrote this guide. When you see the word 'we', it means the NDIA.



We have written this guide in an easy to read way.

We use pictures to explain some ideas.

### Bold

### Not bold

We have written some words in **bold**.

This means the letters are thicker and darker.



We explain what these words mean.

There is a list of these words on page 32.



This Easy Read guide is a summary of another guide called the NDIS Guide to Plan Management.



You can find the NDIS Guide to Plan Management on our website at [www.ndis.gov.au](http://www.ndis.gov.au)



You can ask for help to read this guide. A friend, family member or support person may be able to help you.

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## What is this guide about?



The National Disability Insurance Scheme (NDIS) provides services and support to **NDIS participants**.



NDIS participants are people with disability who take part in the NDIS.



This guide is about **plan management**.



Plan management is a service some NDIS participants get in their plan.



Plan management supports you to manage your **NDIS funding**.



NDIS funding is the money from your plan that pays for the supports and services you need.

This guide has information about:



- what plan management is



- how you can use plan management



- what Plan Managers do.

## What is plan management?

There are 3 ways to manage your plan:



- Self-managed – you manage your plan by yourself



- NDIA-managed – the NDIA manages your plan for you



- Plan-managed – a **Plan Manager** helps you manage part of your plan.



A Plan Manager is a service provider who manages your plan for you.

Plan management can support you by:



- managing your NDIS funding



- helping you pay the service providers who give you supports



- giving you more control over how you use your NDIS funding



- helping you learn new skills so you can be more independent – you can do things for yourself.

## Why is plan management important?

We want to make sure you get a say about:



- how you reach your goals



- what supports and services you use



- how you get your supports and services.



At your planning meeting you can talk to us about who you would like to manage your plan.



If you self-manage your plan, you are completely in charge of your plan.

If your plan is plan-managed, you:



- still get a say in how your plan works



- get support from a Plan Manager



- choose who your Plan Manager is.

## What does a Plan Manager do?

Your Plan Manager:



- pays your service providers



- helps you keep track of your NDIS funding



- keeps a record of how you spend your NDIS funding



- helps you learn new skills so you can be more independent.



The NDIS pays your Plan Manager with your NDIS funding.



But the funding to pay your Plan Manager is separate from your other NDIS funding.

Your Plan Manager can also give you information about:



- what service providers you can use with your NDIS funding



- how much your service providers can charge you



- service providers near you.

## Finding a Plan Manager

You can ask for information about different Plan Managers from someone, such as your:



- ECEI Coordinator



- LAC



- Support Coordinator.



You can learn more about Plan Managers before you start using them.

You can:



- look up Plan Managers on the internet



- check reviews



- ask someone you trust for advice

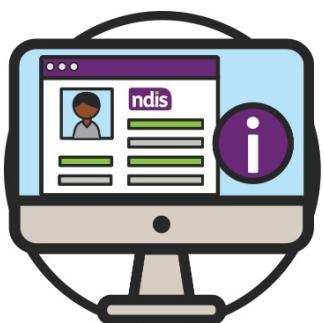


- talk to Plan Managers and ask them questions before you choose them.



You can use the **myplace** portal to find a Plan Manager.

The **myplace** portal is a website where you can:



- keep all your NDIS information



- see and manage your plan



- find service providers.

## Choosing a Plan Manager

Once you choose a Plan Manager, you need to:



- talk to them about your goals



- get a **service agreement**.

A service agreement is a written agreement between you and your service provider.

It explains:



- the supports you will use



- how your service provider will give you those supports



- how much the supports cost.

We talk about these things in more detail on the following pages.

### Meet with your Plan Manager



You need to have a meeting before your Plan Manager starts to manage your plan.

At your first meeting, you talk to your Plan Manager about:



- what supports and services you need



- how much NDIS funding you have for the supports you need



- how to pay your service providers



- how to keep track of your NDIS funding



- how much your Plan Manager will charge you.



You will both decide what your Plan Manager needs to do.



- in person



- on the phone



- using emails or letters.

## Service agreement



When you choose a Plan Manager, they will give you a service agreement.

Your service agreement explains:



- what your Plan Manager will do



- how your Plan Manager will support you



- how much your Plan Manager costs.



If you have a service agreement, you can make sure you get the service you pay for.



Your Plan Manager should make sure you understand your service agreement.

If you need them to, your Plan Manager can give you your service agreement in a different format, such as:



- in a different language



- an Easy Read version.

## What your Plan Manager needs to do

Your Plan Manager must make sure your service providers:



- charge you the right amount



- are paid on time



- send **invoices**.

An invoice is a document that includes:



- a list of services that need to be paid for



- the amount that needs to be paid.



You need to get an invoice every time you pay a service provider with your NDIS funding.



Invoices help your Plan Manager make sure you use your NDIS funding in the right way.

## Reports for you about your funding



Your Plan Manager must give you a report at least every month.

The report should include:



- how you used your NDIS funding



- how much NDIS funding you have left



- if you are spending your NDIS funding too fast or too slow.



Your Plan Manager must give you a Report to help you get ready for your next planning meeting.

The report should include:



- what you spent your NDIS funding on



- if you have any NDIS funding left.

## Feedback and complaints

Your Plan Manager also needs to tell you how you can:



- give **feedback**



- make a **complaint**.

When you give feedback, you tell someone what they:



- are doing well



- can do better.



When you make a complaint,  
you tell someone that something:



- has gone wrong



- isn't working well.

## Changing your Plan Manager



You can change your Plan Manager anytime during your plan.



But you must tell your Plan Manager before the date you plan to change.



Your service agreement says how much time you need to give your Plan Manager before you change.



You and your Plan Manager should agree on the date when you will change.

If you decide to change your Plan Manager, they must give you a report that says:



- how you used your NDIS funding



- how much NDIS funding you have left.

### If you're not happy with your Plan Manager



If you are not happy with your Plan Manager, you should talk to your Plan Manager about it.



But you don't have to talk to your Plan Manager if you don't feel comfortable.



Complaints help service providers learn what they can do better.



If you have any problems with your supports or services, you can contact the NDIS Quality and Safeguards Commission.

We call it the **NDIS Commission**.



The NDIS Commission looks at complaints about service providers.

Service providers need to stay up to date with:



- the NDIS Commission's rules for keeping NDIS participants safe



- the best ways to work with NDIS participants.

You can:



- call the NDIS Commission

**1800 035 544**



- fill out a complaint form on their website

**[www.ndiscommission.gov.au/  
about/complaints](http://www.ndiscommission.gov.au/about/complaints)**

## More information

If you would like more information about what is in this guide, you can contact us.



[www.ndis.gov.au](http://www.ndis.gov.au)



**1800 800 110**



Follow us on Facebook.

[www.facebook.com/NDISAus](https://www.facebook.com/NDISAus)

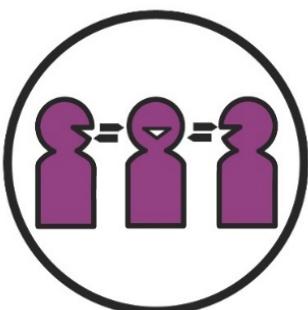


Follow us on Twitter.

@NDIS

## Support to talk to us

If you speak a language other than English,  
you can call:



Translating and Interpreting Service (TIS)  
**131 450**

If you have a speech or hearing impairment,  
you can call:



TTY  
**1800 555 677**



Speak and Listen  
**1800 555 727**



National Relay Service  
**133 677**  
[www.relayservice.gov.au](http://www.relayservice.gov.au)

## Word list



### Complaint

When you make a complaint, you tell someone that something:

- has gone wrong
- isn't working well.



### Feedback

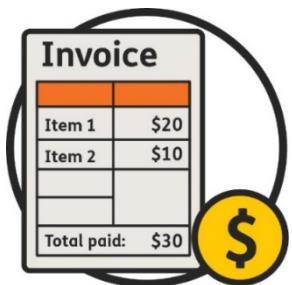
When you give feedback, you tell someone what they:

- are doing well
- can do better.



### Independent

When you are independent, you can do things for yourself.



### Invoice

An invoice is a document that includes:

- a list of services that need to be paid for
- the amount that needs to be paid.



### myplace

myplace is a website you can use to:

- see and manage your Plan
- find service providers.



## NDIS

The NDIS provides services and support to people with disability.



## NDIS Commission

The NDIS Commission looks at complaints about service providers.



## NDIS funding

NDIS funding is the money from your plan that pays for the supports and services you need.



## NDIS participant

NDIS participants are people with disability who take part in the NDIS.



## Plan management

Plan management is a service some NDIS participants get in their plan.



## Plan Manager

A Plan Manager is a service provider who manages your plan for you.



## Service agreement

A service agreement is a written agreement between you and your service provider. It explains:

- the supports you will use
- how your service provider will give you those supports
- how much the supports cost.



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