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If you are working with a participant with a plan in our new computer system, the way participants select their plan manager and the [plan management rules](#) for providers and participants do not change.

Plan managers will continue to help participants to manage funding in their NDIS plan. This includes helping participants to understand the types of supports they can purchase, help them to monitor their budget, and pay invoices for NDIS funded supports on their behalf.

Participants will meet with the NDIA planner who approves their plan. At this meeting, planners will talk to participants about how they want to manage their plan, taking into account any risk factors and sharing the available tools and resources on [plan management](#), [working with providers](#) and the [provider finder](#).

Plan management services can help participants to:

- increase their financial and plan management skills
- learn how to self-manage their plan
- pay providers.

If a participant feels they would benefit from plan management services, they can tell their NDIA planner at their plan meeting. Planners can add funding for plan management services to a participant's NDIS plan.

Participants with one or more support categories with plan management, must select a plan manager, but they have choice and control over who their plan manager is.

Participants with a plan developed in our new computer system can now choose to have self-managed or plan-managed specialist disability accommodation and behaviour supports in their plan.

## Choosing or changing plan managers

Plan Managers with existing service bookings will automatically be recorded as a [my provider](#), when the participant's plan is approved in our new computer system.

Participants who need to choose a plan manager for the first time, or want to change the plan manager they have, will be encouraged to explore the open market and use the [tools](#) and [resources](#) available to identify and approach their preferred plan manager.

A plan manager needs to be recorded as a my provider to be paid, but participants don't need to record providers for their plan managed supports.

Plan managers can only submit claims when they are recorded in the system as the participant's plan manager. If a participant chooses to change plan managers, the new plan manager will be responsible for any outstanding invoices. Once recorded plan managers can submit claims for any period in the participant's plan.

Participants can record, change or remove a plan manager at any time by speaking with their my NDIS contact, by calling the National Contact Centre on 1800 800 110, emailing [enquiries@ndis.gov.au](mailto:enquiries@ndis.gov.au) or on [webchat](#).

We have introduced a self-service feature to make it easier for plan managers to work with participants.

Plan managers can request in the my NDIS provider portal:

- to support a participant
- to end their relationship with a participant
- an extension to an existing relationship.

The request will be sent to the participant's my NDIS contact.

The my NDIS contact will discuss the request with the participant or their authorised representative and ask if they would like to accept, adjust or reject the request.

If the participant does not accept or reject the request within 28 days, the request will be cancelled.

Plan managers will be able to see the status of their request in the my NDIS provider portal.

Once the request is accepted by the participant, the plan manager is recorded as a my provider for the participant. Plan managers will receive a notification in the my NDIS provider portal, and the participant's plan and budget information will be displayed.

## Plan managers and the my NDIS provider portal

Once a participant has chosen their plan manager and the plan manager is recorded as a my provider, consent to view the participant's plan and budget information is automatically applied for the plan manager.

We've improved visibility in the my NDIS provider portal so plan managers recorded as my providers will be able to see if a participant has any self-managed and NDIA-managed supports.

The notifications centre in the my NDIS provider portal dashboard has been updated to help providers have visibility of important information and actions.

Plan managers will receive new notifications from the my NDIS provider portal when:

- They have a new relationship with a participant.
- The start date or end date of an existing relationship changes.
- Their participant has a new plan approved.
- Their participant's plan reassessment date is changed.
- Their participant has an existing plan-managed support category budget changed (increased, decreased or removed).
- Their participant has a new plan-managed support category added.

In the my NDIS provider portal, plan managers will be able to view how much funding is allocated in a participant's plan for plan management fees in the 'choice and control' support category.

Plan managers will be able to view how much funding is allocated to the plan management fees in the 'choice and control budget' in the new my NDIS provider portal, when viewing their participant's plan information.

## Paying for services and supports

Plan managers should use the my NDIS provider portal to view participant information and continue to use the myplace provider portal to submit claims for payment.

Plan managers need to make sure they understand the changes to the [support categories](#) for participants with a plan in our new computer system.

Plan managers can find more information on [claims and payments](#) and [claims and payments troubleshooting](#) on how to self-resolve claiming errors and payment rejections.

## What does day 1 look like for plan managers

Participants can let us know who their plan manager is at any time. They can tell us at their plan meeting, plan implementation meeting, or tell their my NDIS contact or local area coordinator or call our National Contact Centre.

## **What does day 1 look like - Plan managers (May 2025)**

- [What does day 1 look like: Plan managers \(DOCX 299KB\)](#)
- [What does day 1 look like: Plan managers \(PDF 212KB\)](#)

## **Plan manager journey maps**

To help plan managers prepare for their first experience of our new computer system, we have created some plan manager journey maps.

Disclaimer: the journey map for plan managers PDF document cannot be read by a screen reader.

## **Journey map - Participant journey for providers (May 2025)**

- [The participant journey for NDIS providers \(DOCX 293KB\)](#)
- [The participant journey for NDIS providers \(PDF 185KB\)](#)

## **Plan manager checklists and information packs**

### **Checklist - plan managers (May 2025)**

- [Checklist - Plan managers \(DOCX 313KB\)](#)
- [Checklist - Plan managers \(PDF 165KB\)](#)

### **Information pack - plan managers (May 2025)**

- [Plan manager information pack \(DOCX 290KB\)](#)
- [Plan manager information pack \(PDF 227KB\)](#)

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