On this page:

Step 1: Think about if plan management is right for you
Step 2: Do your research
Step 3: Ask questions to learn more
Step 4: Make a service agreement

Step 1: Think about if plan management is right for you

A plan manager can help you:

- understand your plan and what an NDIS support is
- keep track of your budget
- make sure each claim is in line with your plan, budget and NDIS supports
- check and submit claims for payment
- follow the rules about spending NDIS funding
- pay your providers.

Step 2: Do your research

You choose your plan manager. You can change your plan manager during your plan.

You don’t have to wait for your current plan to end.

It can be helpful to ask people you know and trust for advice to start your search for a plan manager. They may be able to give you recommendations.

All plan managers need to be registered with the NDIS Quality and Safeguards Commission .

Do an online search

Do an online search for plan managers near you. We recommend researching as many plan managers as possible, so you have all the right information. Online reviews can be helpful.

It might help to create a list of plan managers and their contact information. Write down what you like about them and any extra information that'll help you compare and decide.

Use the provider finder

The NDIS provider finder is another way to search for plan managers.

It'll give you a provider's:

- website details
- phone number
- email
- contact address.

To start your search:

1. Enter your suburb or postcode in the search bar.
2. Choose the most relevant suburb from the drop-down list.
3. Click on 'registration group' in the sidebar and then tick 'plan management' to find providers registered to deliver plan management services.

Step 3: Ask questions to learn more

Talk to a plan manager before you sign up

It's important to have a good working relationship with your plan manager. It's a good idea to contact them and ask questions before signing up with them.

Questions you may want to ask include:

- Do they hold a meeting at the start of the plan so you can understand what's involved?
- Do they work with people with your disability?
- How often will you hear from your plan manager?
- Do they change their service to work with your communication needs?
- How can they help you understand your budget and the NDIS rules about spending?

Pick the plan manager that meets your needs

Only choose a plan manager you feel confident meets your needs.

Learn more about how to change providers.

Step 4: Make a service agreement

It's a good idea to make a service agreement with your plan manager.

You and your plan manager can be clear about what each party has agreed to. For example:

- the services to be provided
- how these services will be provided
- how long they will be your plan manager
- what happens if you disagree.

Related information

What is a plan manager

How to make a service agreement

NDIS Provider finder

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