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## Roles and responsibilities of a plan manager

A plan manager's role is to help participants by managing their NDIS funding.

Their role relates to plan managed NDIS supports in a participant's NDIS plan. It doesn't include support with day-to-day administration or management of the whole plan.

Plan managers help participants manage their funding so it's spent:

- in line with their plan
- on NDIS supports.

Learn more about [how plan managers support participants](#).

A plan manager isn't responsible for helping participants find and connect with providers or community and mainstream supports.

## Financial administration

The main role of a plan manager is financial administration. They also check claims [meet NDIS integrity and compliance requirements](#).

Plan managers:

- keep track of a participant's NDIS spending
- process invoices
- pay providers
- keep records of how a participant's funds are spent.

## Connect with participants

## Participants choose their plan manager

Participants choose their plan manager. Participants can find a plan manager:

- using the [provider finder](#) tool
- with help from their support coordinator or recovery coach
- by asking friends and family
- using other online resources and websites.

## Make a service agreement

The service agreement outlines:

- what a plan manager will do
- how a plan manager will support the participant
- plan management fees.

Any plan management fees should line up with [the NDIS pricing arrangements and price limits](#).

Learn more about how to [connect with participants as a plan manager](#).

## Access the provider portals

Plan managers need to use the my NDIS provider portal and the myplace provider portal to access participant's plan and budget information.

Learn more about [how to use the provider portals](#).

## How to get paid

Plan managers can only submit claims when they're [connected to a participant and recorded in our system](#) and recorded in our system as the participant's plan manager.

Once recorded, plan managers can submit claims for any period in the participant's plan, provided they meet [NDIS integrity and compliance requirements](#).

Plan managers need to use the myplace provider portal to submit all claims for payment. learn more about what [how to get paid](#).

Plan managers need to be recorded as a [my provider](#) in the my NDIS provider portal to be paid. Plan managers listed as my providers will generally be paid in 2 to 3 business days.

Learn more about [how to be recorded as a my provider](#).

You can also find more information if you need help to [troubleshoot claims and payments](#).

## **Guide to plan management**

The guide to plan management explains:

- the principles of plan management
- how participants and plan managers work together
- plan management activities.

Download the guide to plan management:

- [Guide to plan management \(PDF 3.6MB\)](#)

Download the guide to plan management in Easy Read:

- [Guide to plan management \(PDF 7.1MB\)](#)

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## **Related information**

[\*\*How to connect with participants as a plan manager\*\*](#)

[\*\*How to support participants as a plan manager\*\*](#)

[\*\*How to use the provider portals\*\*](#)

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