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Step 1: Understand your participant’s plan

Make sure funds are spent in line with the plan

It’s important to understand:

- what an NDIS support is
- what is not an NDIS support
- what a replacement support is.

Learn more about support budgets and categories.

Step 2: Understand your tasks as a plan manager

You need to support your participants by:

- having an establishment or set up meeting with them
- providing financial administration of their plan
- keeping track of their budgets
- assessing and submitting claims, processing invoices and paying providers
- making sure each claim is in line with their plan, budget and NDIS supports
- making sure they’re aware of and approve claims
- keeping records of how NDIS funding is spent
- making sure each claim meets NDIS compliance requirements
- helping to resolve payment disputes.

Step 3: Pay service providers

You'll pay invoices for NDIS supports on a participant's behalf.

The NDIS pricing schedule sets out information about what we consider to be the appropriate and reasonable maximum prices for all NDIS supports.

Use the myplace provider portal to submit a claim for payment after providers have delivered the service.

You need to ask your participants for authorisation when managing claims and paying providers.

You should pay providers or reimburse participants in a timely manner. This should be within 2 business days of you receiving payment from the NDIS.

Claims can't exceed the total funding amount available in your participant's plan.

Funding must be spent within the current plan. Any unused funding won't roll over to a new plan.

Flexibility when claiming over funding periods

Your participant's support needs may change and they may not line up with their funding periods.

You may be able to claim for NDIS supports when this happens.

You can claim their NDIS supports in the next funding period if:

- the participant and their providers agree to claim in the next funding period
- the participant has enough funding to cover the supports needed for that period and in the rest of their plan.

If a claim is made from the next funding period, you should work with the participant to:

- review the service agreement and delivery schedule
- adjust the service agreement or delivery schedule to make sure they can cover their supports until the end of their plan.

You can contact us if you think a participant is using their funding too quickly.

Step 4: Prepare monthly reports and statements

You must provide participants with a monthly financial statement. This helps keep your participants informed about their spending.

Monthly financial statements should include:

- how much of their NDIS plan has been spent

- whether the amount spent is consistent with expectations for the funding period, components and total funding amount
- the remaining balance of funds in their plan
- any concerns about overspending NDIS funds, where required.

You may also need to prepare reports and statements when participants choose to change plan management providers and for plan reassessments.

Step 5: Help participants change plan managers

Participants can choose to change their plan manager at any time.

You should help participants if they want to move to a new plan manager.

The current plan manager can submit claims for any period, including supports delivered when they weren't the plan manager. Claims submitted by the previous plan manager will be rejected, even if they were the plan manager at the time the supports were delivered. The previous plan manager should forward any outstanding invoices to the new plan manager for processing.

If participants want to change or remove their plan manager, they need to let us know. They can do this by:

- speaking with their my NDIS contact
- calling the National Contact Centre on 1800 800 110
- submitting an enquiry through our service hub .

If you want to end your relationship with a participant, it can be done in the provider portals. You need to give participants 28 days' notice. This should be outlined in the service agreement. You also need to continue to meet their obligations until the relationship ends.

Related information

Guide to NDIS support budgets

Pricing arrangements and price limits

Guide to report writing

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