

Fact Sheet: your guide to Plan Management



For some people, the NDIS can be complex. Plan Management frees you or your nominee from a whole lot of time-consuming and tricky paperwork.

What is plan management?

Plan management is one of the ways your NDIS funding can be managed. You can choose to use a plan management specialist, called a Plan Manager, who can manage a your funds on your behalf.

A Plan Manager will:

- Pay service providers and claim from the NDIS.
- Keep track of your spending.
- Maintain accurate, auditable financial records.

Some Plan Managers may also help with other aspects, such as:

- Exploring different budgeting options or scenarios.
- Help participants understand their NDIS plan.

Managing NDIS funds

The NDIS allows you to choose how you would like to manage your plan funding. Working out what is best will be specific to each person's circumstances. Plan Management is not held to the 'reasonable and necessary' test.

In the NDIS scheme there are three options to choose from. You can choose one or a combination of these options:

- Agency-managed
- **Plan managed** by an NDIS registered Plan Manager, such as Integra
- Self-managed

For a detailed view of these options, please see overleaf.

Benefits of using a Plan Manager

Working with a professional Plan Manager gives you increased choice and control of you plan without the hassle of managing the financial paperwork.

When you choose to use a Plan Manager, you can benefit in a number of ways. You:

- Can choose supports from registered and non-NDIS registered providers such as a gardener, cleaner or organisations and therapists who have chosen not to register.
- Don't have to use the NDIS Portal or talk to the NDIS call centre – which some people find complex and time consuming.
- Have a trusted partner helping you to navigate the NDIS and ensure you get the most out of your plan.
- Have the choice and control of Self-Management without the administrative burden of paying and claiming invoices.
- Don't have to pay for plan management from your core budgets. Plan Management is funded separately in your plan.



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NDIS funding management options

You can choose to have your plan funds:

- Agency-managed
- **Plan managed** by an NDIS registered Plan Manager, such as Integra
- Self-managed

Or a combination of the above.

Agency-managed	Plan managed	Self-managed
<p>This means the National Disability Insurance Agency (NDIA) manages your funds</p> <p>–</p> <ul style="list-style-type: none"> • Ability to check the myplace portal to see claims providers are making against your NDIS funds • Choose from registered providers only 	<p>Use an NDIS registered plan manager to work with you and take on administration tasks that may be difficult or time consuming</p> <p>–</p> <ul style="list-style-type: none"> • Increased control over how your plan funds are used • Choose registered and non-registered providers • Help with paying your NDIS support providers • Professional budget management, ensuring funds are available for the length of the plan • Help navigating the NDIS 	<p>Taking full responsibility for the management of your funds</p> <p>–</p> <ul style="list-style-type: none"> • Make decisions in line with your plan goals • Choose registered and non-registered providers • Employ your own staff or pay someone to employ others • Control and full responsibility for your NDIS funds and claiming from the NDIS

Why choose Integra?

Integra is an NDIS registered, independent service provider – which means we are here to provide you with expert, unbiased support that keeps you and your interests top of mind.

When you choose Integra, you'll enjoy a fast and easy payment process and benefit from our team of experienced staff guiding you through the NDIS maze.

You'll also get access to your own 'MyIntegra Plan' online portal where you can easily manage your budget.

