

## Financial Plan Management Fact Sheet

**Plan Management** allows you to appoint a plan manager to manage your NDIS plan funding. It is paid for by the NDIS on top of your NDIS Plan, however, it needs to be requested during your NDIS planning meeting or review. Choosing Plan Management gives you the flexibility to pick whichever providers you like without the additional workload needed to look after your own claims.

You can also manage your funding through:

- **Agency managed:** the NDIA manages your NDIS Plan finances for you (your provider's must be registered and claim directly)
- **Self-managed:** You are the only one responsible for managing all financial aspects of your plan
- **Combination:** You can combine the mentioned funding methods to be used across the different budgets in your plan

**Parent to Parent (P2P)** a not-for-profit, NDIS registered Plan Manager that you can use to support your financial responsibilities under the NDIS.

We act as a middleman between you (**NDIS participants**), your claims (**providers**), and **the NDIA** to ensure smooth payments occur with your plan's funding.

As your **Plan Managers**, we:



Submit your invoices from NDIS service providers directly to the NDIA on your behalf.



Allow you to choose whether you want to review the invoices before we submit them or automatically process them.



Check your invoices to make sure they are correct and have the right information.



Give you access to our online Participant Platform (*Planability*) to help you view your budget and claims.



Send you regular funding statements to help you keep track of your spending.



Offer our own [resources](#) and years of experience to provide support with any questions or information you have in order to meet your plan's goals.

## What can Plan Managers do for you?

There are some things that Plan Managers can and cannot do to help you.

Plan Managers can...	Plan Managers cannot...
✓ Make payments to my providers	✗ Pay over the NDIS price limits for my support
✓ Reimburse me for things I have purchased	✗ Employ my support workers or providers
✓ Send me invoices to check or approve	✗ Check the invoice matches the support I have received
✓ Pay independent or unregistered support workers	✗ Pay my family members as a support worker
✓ Tell me which categories I have access to	✗ Tell me where invoices can be claimed from
✓ Provide information on what has been spent	✗ Approve my quotes or invoices
✓ Send me information on what has been spent	✗ Know how long my funding will last for
✓ Check my invoices meet NDIS rules	✗ Decide which line item a support should use
✓ Provide budget updates or statement	✗ Help me with a plan review or attend the review

Parent to Parent Plan Management offers many resources on our website to assist our participants get the most out of their NDIS plan.