



Liberty Disability Services
People. Options. Power

What Is Plan Management?

And why it could be the best option for you.

If you're navigating the NDIS, you might be wondering: What is plan management?

At Liberty Disability Services, we help people make sense of their plans, reduce the paperwork stress and focus on what really matters- your goals, supports and quality of life.

Here's a clear guide to plan management- what it is, how it works, and why it might be the right choice for you.

What exactly is Plan Management?

Plan management is one of the ways participants can manage their NDIS funding.

Under the NDIS, there are three options to manage funds.

1. Agency Managed
2. Self-Managed
3. Plan Managed

1. Agency-managed- the NDIA (National Disability Insurance Agency) handles payments directly to providers.
2. Self-managed- you (or a nominee) handle invoices, payments, record keeping, and reporting.
3. Plan-managed- a registered plan manager (like Liberty Disability Services) takes care of the financial administration, so you have support but still retain choice and flexibility.

When you choose plan management, the NDIS includes a specific budget for it (under “Improved Life Choices”), so there is no extra out-of-pocket cost to you for having a plan manager.

What does a Plan Manager actually do?

A plan manager is like your financial partner in your NDIS journey. Here's what they can do for you:

- **Pay provider invoices**

When your support providers (therapists, carers, services) send you invoices, your plan manager processes them and makes the claim to the NDIS.

- **Monitoring your budget**

They keep track of how much funding you've used, what's left, and how spending is trending.

- **Regular statements**

A good plan manager will provide monthly (or regularly scheduled) statements, breaking down how your funds have been spent and ensuring you know where things stand.

- **Advice and support**

Plan managers can give you guidance on how to best use your budget, helping you make informed decisions.

- **Managing compliance**

They ensure that spending aligns with NDIS rules, price guides, and reporting requirements, so that claims are valid, providers verified and no out of pocket expenses for the participants.

- **Record keeping**

They keep track of your invoices and financial records, which helps if there's an audit or review.

What makes Plan Management different from the other options?

More Choice

With plan management, you're not limited to only NDIS-registered providers. A big advantage is that you can work with non-registered providers too. This gives you more flexibility in who you choose- whether it's a small community provider, an independent therapist or someone local you trust.

Less Admin Hassle

You don't need to become an accountant overnight. Your plan manager handles the invoicing, claims, payments, and record-keeping. That means less paperwork for you, and more time for things that matter.

Better Budget Visibility

Through regular budgeting reports and statements from your plan manager, you'll always know how much of your plan has been spent. This helps you make informed decisions and avoid unexpected shortfalls.

Confidence & Compliance

Because plan managers are registered providers and understand the NDIS rules, you can feel confident that your spending is compliant. That reduces the risk of errors or rejected claims.

Funded Separately

Importantly, plan management doesn't use your core support budget. The NDIS includes extra funding just for it. They do this when you first set up your plan, and ask to have it 'plan managed'.

Skill Building

Using a plan manager can also help you build your financial confidence. Many plan managers support participants to understand their budgets, and even to gradually move towards self-management if that's what you want.

Who is Plan Management best for?

Deciding whether plan management is right for you depends on your personal needs, capacity, and goals.

Here are some situations where plan management would be best suited.

You want control over who supports you, but don't want to deal with the paperwork.

You want access to a wider range of providers, including non-registered ones.

You want clear, regular financial reporting, so you can track how your plan is being used.

You want to learn how to manage your budget, without doing it all by yourself.

You want a trusted partner handling payments, so your support providers are paid on time.

Potential Challenges & Considerations

While plan management has many benefits, it's worth being aware of some things to watch for.

These include...

Choosing a reliable plan manager

Not all plan managers are created equal. Look for someone who is registered, transparent, provides clear statements, and communicates well.

**Fees are covered,
but oversight is
still needed.**

Even though their
service is funded by
the NDIS, it's
important that your
plan manager
keeps accurate
records and spends
carefully.

Switching plan managers.

If you ever want to change your plan manager, you can.

According to NDIS, you can tell your current manager, and your new manager will take over responsibility (this includes paying any old invoices).

Supports getting approved, or not.

A plan manager doesn't decide whether your supports are "reasonable and necessary"

That's still the NDIA's job.

Why choose Liberty Disability Services?

At Liberty Disability Services, we understand that navigating your NDIS plan can feel overwhelming. Our goal is to make plan management as simple, clear, and empowering as possible, so that you can focus on your support, your goals, and your life... NOT the paperwork.

Here's how we help:

Clear and consistent reporting

We provide easy-to-read statements every month, so you always know where your budget is at. We also provide you access to an easy to use plan management portal where you can view your live plan budget balances and details of invoice processed.

Trusted Support

We're a registered NDIS plan manager, so your funding is handled correctly, and your providers are paid on time.

It's your choice & your control

Work with the providers you want, including non-registered ones- without giving up support.

Education & Empowerment

We don't just pay invoices. We help you understand your plan, your funding, and your options, so you feel confident in your decisions.

Personalised Service

We take the time to understand you and as an individual. We learn about your goals, your challenges, and your unique NDIS plan. Then we tailor our support to suit your needs. We have a dedicated team who can provide advice via email and phone during business hours.

Overall, Liberty Disability Services ensures that plan spending is always compliant to the current NDIS guidelines- to ensure there is no risk of participants having to fund purchases out of pocket.

Our plan management team provides reports to track spending, individual plan guidance, and a supportive conversation when you require assistance.

We offer a professional, friendly and timely service that allows participants to make the absolute best use of their plan.

How to Get Plan Management in Your NDIS Plan

Getting plan management included in your NDIS plan is easy!

Here's what do to:

Ask for it at your planning meeting

During your NDIS planning meeting, tell your planner that you want plan management. The NDIS will then allocate funding for a plan manager in your plan.

Mid-plan change

If you're already in a plan and decide you want to switch to plan management, you can change.

Contact the NDIS or your Local Area Coordinator (LAC) to discuss adding a plan manager.

Choose your plan manager

You have full choice and control.

Research plan managers, ask questions, and pick someone you trust.

You can also change later if you need to.

Sign a service agreement

Once you've chosen, you'll set up a service agreement with your plan manager.

This document explains:

1. What services they will provide
2. How long they'll manage your plan, and
3. How they will communicate with you.

Common questions about Plan Management

**Will it cost me
money?**

No. The NDIS includes funding for plan management in your plan under the “Improved Life Choices” category.

Can I still choose my providers?

Yes! You have full choice, and with plan management, you're not limited to only NDIS-registered providers.

Does my Plan Manager decide what supports I have?

No. The plan manager handles administration, financial reporting, and invoicing, but they do not decide what supports are “reasonable and necessary”.

That is determined by the NDIA.

What if I don't like my plan manager?

You can change! The choice is always yours.

Your new plan manager will take over responsibility, and they can process old invoices so you're not left out of pocket.

In Summary: The Benefits of Plan Management

Choosing plan management gives you:

- Freedom to choose the supports you want.
- Less paperwork stress.
- Clear insight into your budget.

- No extra cost to you.
- Professional support and financial compliance in a timely, professional manner.
- Opportunity to build your skills and confidence over time.

Plan management offers a balance: you keep control and choice, but you don't have to do all the heavy lifting.

Take the Next Step with Liberty Disability Services

If you think plan management might be right for you, or you want to discuss it further, we're here to help.

- Visit our Plan Management page to learn more about how we support you.
- Contact us for a chat. We can guide you through how plan management works, what to ask, and how to choose the RIGHT provider.

Already have a
plan and want to
switch to plan
management?

Let us know, and
we'll assist you to
make the
transition go
smoothly.

Final thoughts

Deciding how to manage your NDIS plan is a big decision. But it doesn't need to be confusing. Plan management can be empowering, giving you choice, support, and clarity- without the burden of numbers, invoices and admin.

Liberty Disability
Services works to be
so much more than
just an 'invoice paying
service'.

We want to be your
trusted partner,
supporting you to
make the most of your
plan, reduce stress,
and stay focused on
what truly matters -
YOU and your goals.

Feel free to
contact us, and
let's explore how
plan management
could work for you.

Together, let's work
towards smoother,
smarter NDIS
planning.