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Blind Citizens Australia

# Deciding How to Manage Your Plan

When you have your planning meeting with the National Disability Insurance Agency, you will be asked how you would like your plan to be managed. This will determine who will receive and pay the invoices for supports and services you receive.

There are four different ways to manage your plan, which are explained further in this fact sheet. It is important to choose which method you would like to use during your planning meeting. Once your plan has been approved, you will have to ask for it to be reviewed in order to change the way it is managed.

## 1. Agency Managed

* If you are Agency Managed, you will not have to deal with any invoicing or payments.
* The providers you use will bill the National Disability Insurance Agency, and the National Disability Insurance Agency will pay them directly.
* If you choose to be Agency Managed, you are only able to use providers that have registered with the National Disability Insurance Agency. These providers will not be able to charge you a higher price than that which is listed in the NDIS price guide.
* You can use the online Participant Portal to see what funding providers have claimed and how much funding you have left.
* Having your plan agency Managed will be the least amount of work for you, however it is the least flexible in terms of giving you choice and control over the providers you use.

## 2. Plan Managed

* A plan manager (also known as a financial intermediary) is a third party that will manage the payment of invoices on your behalf.
* Although your plan manager must be registered with the National Disability Insurance Agency, the providers you use do not; this gives you more choice over who you use without the responsibility of handling the financial transactions.
* Your plan manager can provide you with regular statements on what has been claimed and how much money you have left in each of your budgets.
* If you choose to be plan managed, the National Disability Insurance Agency will incorporate funding into your plan that will cover the cost of this service. It will not come out of one of your other budgets.
* The role of a plan manager is solely to handle financial transactions. They are not responsible for arranging services for you.

## 3. Self-Managed

* Self-Managing your plan means that when you receive a service from a provider, they will invoice you for this service. You will have to pay the invoice and then claim the amount from the National Disability Insurance Agency via the online Participant Portal.
* If you choose to Self-Manage your plan, you can use any service provider you choose, they do not have to be registered with the NDIA. You may also choose to receive services from providers who charge above the benchmark price; this means you can receive the service you want however it may mean the amount of hours you have funds available for will decrease.
* The NDIA has not outlined any specific record-keeping requirements for participants who self-manage. It is a good idea to keep your invoices and records of the services you receive though, just in case you are asked to provide these to the NDIA.
* There are some budgets in your plan which cannot be self-managed; these include:

- Support Coordination (all support coordinators must be registered with the NDIA

- Assistive Technology that meet certain criteria

- Any items that require a quote, such as home modifications

- Funding that is provided to cover the cost of a Plan Manager

* If you would like to self-manage but are unsure of how to do this, you can ask the NDIA to fund training for you. You can discuss this at your planning meeting.
* If you are going to employ support workers directly (not through a service provider agency) you may be required to pay superannuation and other related expenses, the National Disability Insurance Agency can provide you with additional resources on this topic.

## 4. A combination of methods

* You can choose to use a combination of the above methods if you would prefer. For example, you could have a range of suitable providers for your Core supports, but might be finding it difficult to find a therapist for your Capacity Building supports. You could self-manage the capacity building budget so you have the option to use an unregistered provider and leave your core budget Agency managed.
* Alternatively, you can choose to self-manage a portion of a budget (say 50%) and have the rest agency managed.