

HOW TO CHOOSE A PLAN MANAGER

The NDIS gives people with a disability unprecedented choice and control over the supports they receive – and that’s equally true when it comes to choosing a Plan Manager. But with so many options out there, how can you be sure you’re finding the one who’s right for you?

WHAT’S ON OFFER

There’s a huge variety of businesses that offer Plan Management services, ranging from small accountancy firms, to disability service providers and specialised organisations. No matter what kind of Plan Manager you want, there are three overarching things that can make a big difference.

1. **Trust.** Firstly, you need to be able to trust your Plan Manager to take care of your NDIS budgets, offer you independent advice and be completely open with you about how budgets are tracking.
2. **Expertise.** Your Plan Manager should be experts in the NDIS and know all its ins and outs, so they can give you valuable advice on how to get the most out of the NDIS.
3. **Understanding.** Finally, you need to know that your Plan Manager is driven by a desire to help NDIS participants get the most out of their NDIS plan and will go above and beyond to understand and support them through their NDIS journey.

With these three things in mind, you can start to explore your options a little closer.

Lakeside Rooms is the first multidisciplinary group private practice for mental health professionals on the Gold Coast; offering services to patients from psychologists and psychiatrists.

Find out more at www.lakesiderooms.com.au or call us on 07 5562 0466

DO YOUR RESEARCH

Before selecting a Plan Manager, it's a good idea to spend some time researching what's out there. There are plenty of online resources that allow people to rate, review and comment on service providers and Plan Managers, but two of the biggest and most active ones are Clickability and MyCareSpace. These websites let you search for a specific Plan Manager and provide some background and customer reviews for each.

Speaking with other NDIS participants or your Local Area Coordinator is another great way to get a sense of which Plan Managers offer a high level of service.

YOUR PLAN MANAGER CHECKLIST

Once you have a sense of the Plan Managers you might like to use, it's time to take a closer look at what features and services each is offering.

The best way to do this is by checking their website or just giving them a call, and use this checklist:

• CUSTOMER SERVICE

- Do they have a customer charter that outlines their promises to their customers?
- Do they offer multiple methods to contact them?
- If you call them, do they take the time to have a chat with you, understand your needs and give you clear information and valuable advice?
- Do they offer a simple, online sign-up process?

- **PAYMENT AND BUDGETS**

- Do they provide an online tool and a monthly overview for you to track the status of your NDIS budgets?
- Are they clear about their invoice payment process, including their payment times?
- Can you track the status of your invoices online?
- Can they secure your budgets with agreed service providers to protect you against overspending?

- **EXPERTISE**

- Are they specialised in NDIS Plan Management or is it one of the many things they do?
- Do they have a background in financial services and the disability sector, or just one of these?
- Do they also provide Support Coordination, so if you'd need to, they can handle not only the financial but also the organisational aspects of your NDIS plan?

DON'T RUSH

Given Plan Management can help you unlock the full potential of your NDIS plan, it's worth taking your time to ensure the Plan Manager you choose is right for you and your situation. Taking the time to think about what you need and ensuring it's offered by the Plan Manager you choose can avoid disappointment in the future.

More information

Contact our friendly team on **07 55620466** or [leave your details here](#). We're happy to discuss what we can do for you.

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NDIS Information Sheet

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