

# Peer support network topic: Plan Management Options in the NDIS

## Introduction

It is part of United Nations human rights that people with disability be provided with the opportunity to choose what you want in your life, and decide how you want it. The NDIS encompasses self-directed support by ensuring that the person living with disability is provided with choice and control to live their life how they decide and one aspect of choice provided within the NDIS is how the plan is managed. This discussion topic aims to provide members of your peer support network with an initial overview of plan management and the various plan management options provided by the NDIS.

## Let's make it happen

The NDIS is based on the need to ensure people with disability are at the centre of their own lives, and therefore they should be central to their supports and plans. This guide provides a series of discussion points and resources on plan management and the available options within the NDIS:

- 1. *What is Self-Directed Support (SDS)?*** Self-directed support, alongside the NDIS and other National Disability Strategy policies, is intended to support, promote and protect human rights and independent living of people with disability who may be care and support users. It aims to ensure that care and support is delivered in a way that supports choice and control over one's own life and which respects the person's right to fully participate in society.
- 2. *What is an Individually Funded Plan (IFP)?*** If you are accepted as eligible for the NDIS, you will have an Individually Funded Package (IFP) which will give an amount of funding to enable you to secure support to meet your life goals. There are many ways of managing this package of fund, or budget. Managing the funding for an IFP means purchasing the supports in the plan, receiving and managing the funding provided by the NDIS, and acquitting the funding. In other words, it involved budgeting, keeping records and paying for the support provided by an IFP.  
*What are some skills you would need to do plan management tasks such as budgeting?*  
*Do you have such skills or have an interest in learning these skills?*
- 3. *Plan Management Options:*** So who can and/or should do the management of the plan for the person with disability? There are a range of options: it can be done by the participant or their family member, by the agency (NDIA) itself, or by someone else who is paid to do this. It is important to remember, whoever is doing the plan management, it should be done according to the individual's wishes and choices. A person with disability can consider what aspects of Plan Management (if any) they

## QuickGuide

would like to do, or not like to do, and also consider their capacity to perform the role(s). Then they can decide between the four plan management options available in the NDIS:

- a. Registered Plan Management provider
  - b. NDIS Managed
  - c. Self-managed
  - d. A combination of the above
4. **What is Option 1?** Having a Registered Plan Management provider means that a provider acts as a financial intermediary for the person with disability, managing the movement of the funding for the supports provided to the person with disability. If this is selected, the NDIS Plan (IFP) will include funding to use a registered Plan Management provider as an additional item. The provider acts to pay providers of services and support, process expense claims, develop monthly statements, and claim payment from the NDIS on behalf of the person with disability.
5. **What is Option 2?** People with disability are able to choose the NDIS itself to act as a financial intermediary for them, managing the movement of the funding for the supports provided to the participant. If this is selected, people with disability are only able to use registered providers from the registered provider list on the NDIS website. The NDIS acts to pay providers of services and support, process expense claims, develop monthly statements, and claim payment from the NDIS on behalf of the person with disability.
6. **What is Option 3?** People with disability can choose to manage the funding for their supports from their IFP themselves (or with the support of family and/or friends). This gives more flexibility and a wider choice of providers as they do not have to use only registered support providers. You can also pay more than the maximum price listed in the NDIS Price Guides as long as you don't spend more than the total budget. There are certainly more responsibilities, but research does show that this is the BEST way to get self-directed supports (as you are managing it all yourself).
7. **What is Option 4?** The final option is using a combination of the plan management options available. The combination method can be a great option as you can choose different plan management methods for different parts of your NDIS Plan/Budget. This may also give you a way to build skills, and gain benefits from some areas whilst keeping other areas simple.
8. **How should I choose?** Selecting between the plan management options should be based on a variety of factors, and should be an individual choice. Items to consider include:
- a. What finance and accounting skills do you have?
  - b. Do you want to use your own employed support workers?
  - c. Do you have the spare time to manage your supports?
  - d. How many facets are there to your plan, and how much work will it take to manage?

## QuickGuide

- e. What plan management providers are available for you to use?
- f. Do you want to use non-registered service providers for any aspects of your plan?
- g. Do you have an interest in gaining skills in banking, invoice payment, account management, accounts, keeping paperwork and alike?
- h. Does anyone who you trust in your family or friendship group have the skills to do this with you? Are they willing to do this with you?
- i. Do you have some clear ideas about how you could gain the required skills to work toward full self-management in the future?

Some of these questions relate to gaining skills that will be required under the self-management option. This is because if you are self-managing some or all of the funds in your IFP (or Budget), or preparing to transition to self-management, you can choose to purchase supports from your Core Supports budget through a support item called: Self-management capacity building. This could include individual capacity building items related to accounting.

This topic can be a complicated area but it an important one in ensuring members of your peer support network can give as much detail as possible to ensure members can made an informed decision in relation to their plan management.

### Where you can find more information

There are online resources about plan management and plan management options available:

- [www.TheGrowingSpace.com.au](http://www.TheGrowingSpace.com.au) provides a range of fact sheets on plan management and the options including some great advice about making this decision.
- Of course there is HEAPS of user guides, factsheets and short films on the NDIS website, including:
  - Starting my plan (all the plan management options are featured) at: <https://www.ndis.gov.au/participants/startingmyplan>
  - Self employing support workers (which is possible under Self-Management): <https://www.ndis.gov.au/html/sites/default/files/Directly-engaging-my-own-staff.pdf>
  - And related topics. Simply use the search button on the NDIS website.
- Seeva – use this to find service providers (it is just like TripAdvisor for disability services!) head to: [www.seeva.com.au](http://www.seeva.com.au)

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