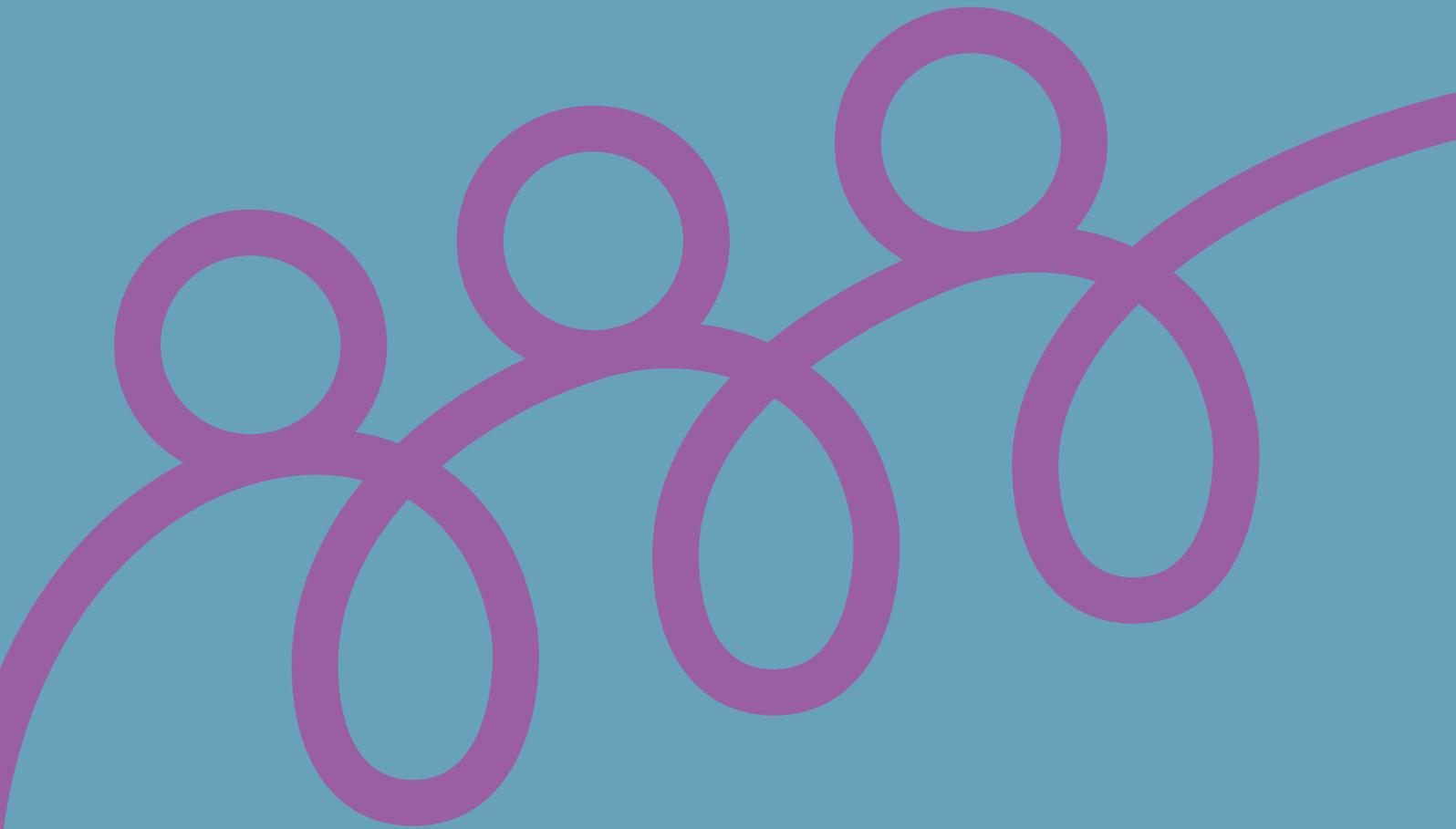


Working with the NDIS

A Plan Partners eBook



About this eBook:

The National Disability Insurance Scheme (NDIS) is the new system through which people with disabilities receive support. It's designed to give people more control and choice over their supports, so they can achieve their goals in life.

As a service provider, you can play a vital role in helping bring the NDIS to life for your customers.

But before you can deliver services to NDIS participants, you should have a solid understanding of how the scheme will impact all parts of your business and customers, and ensure you comply with the rules and regulations of the NDIS.

Understanding the ins and outs of the NDIS can also present your business with some fantastic opportunities to grow and prosper.

While this book is primarily designed to get organisations 'NDIS-ready', businesses that are already working with customers on the NDIS will gain a lot from it too.

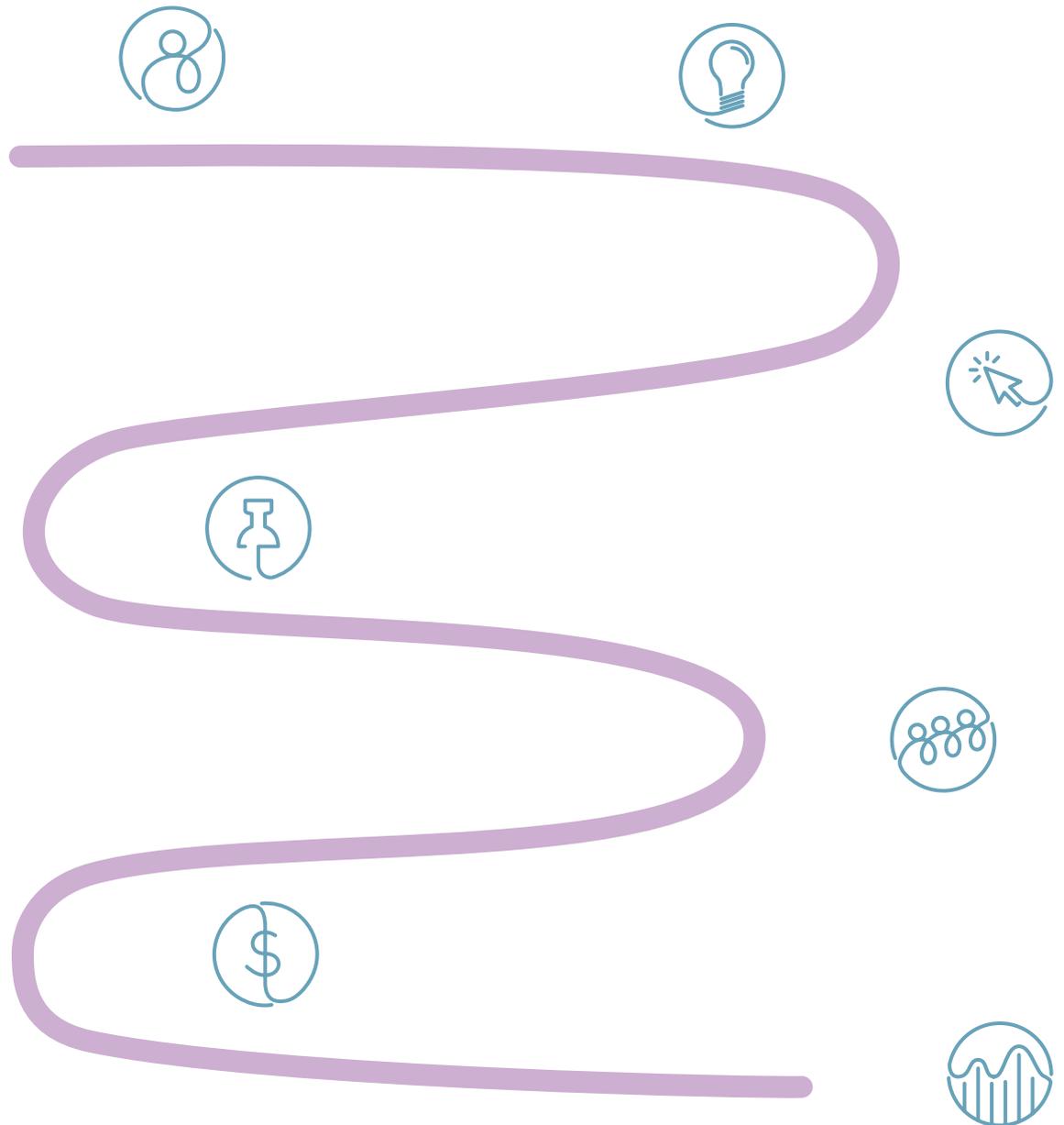
Plan Partners, 2018

This e-book contains general information and doesn't take your personal circumstances into account. Please consider whether the information is right for you before making a decision.

Plan Management Partners Pty Ltd | ABN 54 609 868 993

Your NDIS Journey

From NDIS basics to tips on how to make sure you're getting paid, this book will give you the tools you need to help work with the NDIS - just follow the steps:



Of course, we can't fit everything into one book. If you need to know more about anything, or have questions which are not answered in this book, just give our friendly team a call on **1300 333 700** or email us at **admin@planpartners.com.au**

You can also find more information, including a dedicated 'service provider webpage', handy blogs and Easy English brochures, at **www.planpartners.com.au**

As Australia's leading expert in NDIS Plan Management and Support Coordination, Plan Partners are experts in the disability sector and we know the NDIS inside-out. We've provided Plan Management and Support Coordination services to thousands of NDIS participants around the country, and work with both NDIS-registered and non-registered service providers, just like you, every day.



Step 1:

Understanding a participant's NDIS journey

Now that funding is delivered through the NDIS, making the change to the new system is something most of your customers with a disability will need to do at some point in the near future. When they do, they'll become an 'NDIS participant'.

In this section we'll look at the journey NDIS participants go through and how they can get the most out of this exciting new scheme.

A participant's NDIS journey

For many people with a disability, the NDIS journey can be as daunting and complex as it is exciting – particularly in the early stages. By understanding this journey (which we've broken down into seven simple steps) you'll find it easier to work with your customers throughout the process.

1. Prepare

As with many things, preparation is the key to getting the most out of the NDIS. In the [resource section of the Plan Partners website](#), you'll find a handy checklist we've prepared to help – feel free to share this with your customers, or send them to our [website](#) or this [blog](#) by one of our Plan Partners customers, for more information.

it for them or get an expert Plan Manager to handle it. Many people choose a Plan Manager like Plan Partners because it offers the most choice and flexibility, saves time and makes managing NDIS funds easy.

Here's a summary of the three options. You can find more detail on our website by following this [link](#) or reading this [blog](#).

2. The Planning Meeting

The NDIS determines what sort of supports and funding a person needs using a planning meeting in which participants discuss their goals, abilities, and more. We'll look at this in more detail [here](#).

3. Knowing their NDIS Plan

After the planning meeting, your customer will receive their NDIS plan. As this decides their funding arrangements for the year ahead, it's important they check it closely and ensure they're happy with everything it. If they're not, they can request a review.

4. Organise their NDIS finances

Participants will need to ensure their service providers are being paid on time and keep track of the progress of their funding.

Your customers can choose to manage their own plans (self-managed), get the NDIS to do

| | Plan Partners | NDIS Managed | Self Managed |
|--|---------------|--------------|--------------|
| Manage your invoices and make sure your providers are paid | ✓ | ✓ | ✗ |
| Allow you to use registered and non-registered providers | ✓ | ✗ | ✓ |
| Manage your service agreements | ✓ | ✗ | ✗ |
| Keep track of your budgets | ✓ | ✗ | ✗ |
| 24/7 access to your own online dashboard to track your spending and status of invoices | ✓ | ✗ | ✗ |
| Monthly funding overviews | ✓ | ✗ | ✗ |
| Advise you on how to find service providers | ✓ | ✗ | ✗ |
| Support Coordination (if included in NDIS plan): finding and connecting you with service providers | ✓ | ✗ | ✗ |
| Advice for your service providers on how to invoice and work under the NDIS | ✓ | ✗ | ✗ |
| Independent advice and expertise through every step of your NDIS journey | ✓ | ✗ | ✗ |

Plan Management can also have some serious benefits for service providers. When your customers are plan managed by Plan Partners, you can be sure their NDIS budgets are tracked well and their invoices will be processed promptly. You will also get your own Plan Partners [Online Dashboard](#), where you can quickly and easily see the invoices you have in our system and check the progress of payments for each of your customers.

All NDIS participants are entitled to have Plan Management included in their NDIS plan, at no cost to them. All they have to do is ask. (it's under the category called 'Improved Life Choices' – read more about NDIS funding categories [here](#).)

5. Organise Supports

Finding the right providers is another very important part of the NDIS. Participants will need to make sure their chosen providers are the right fit for their situation and needs. Setting up service agreements with each provider helps protect both parties from any disagreements or misunderstandings in the future. If Support Coordination is included in their plan, they can ask a support coordinator to help find and connect them with service providers. Plan Partners offers Support Coordination all over Australia.

If you or your customers need more information about these steps, you can check the process in more detail on our [website](#) or read some informative [blogs](#).

We have also put together an eBook for NDIS participants, which can provide valuable information and assistance to your customers – just send them to our website to download their copy.

Not everyone is entitled to Support Coordination – your customer will need to ask for it specifically in their planning meeting and be able to explain why they believe they need that support. You can read more about Support Coordination and eligibility in this [blog](#).

6. Track the progress of the plan

Now the planning and organising is complete, it's time for your customer to receive their supports and start enjoying the improvements they bring. They will need to keep a record of all the supports they receive and when they're delivered, and - most importantly - keep track of their NDIS budget. If they have chosen to receive Plan Management from Plan Partners, they'll be able to use our [online dashboard](#) to keep an eye on their budget with ease.

7. Annual Plan review

Each year, participants will get the chance to meet with the NDIS to review their plan, provide feedback and request any changes. They will need to be clear about why they want to change their plan and take with them any supporting documentation that might help. Read more about the Annual Plan review [here](#).



Step 2: Understanding what's in an NDIS plan

The foundation of each NDIS journey: the NDIS plan

The main foundation of a participant's NDIS journey is their **NDIS plan** – a document that outlines the supports they need and how much funding has been allocated to each of those supports. The NDIS plan will generally cover a one-year period, after which it will be reviewed by the NDIS to determine what is needed for the following year.

NDIS plans are put together by the NDIS directly, or through a **Local Area Coordinator (LAC)** - the regional organisation allocated to help people in a specific area to access the NDIS. They'll build the participant's plan around their specific needs and goals, based on the information given to them during a planning meeting.

Above all, it's important to remember that the NDIS is designed to fund things which are directly related to a person's disability and which are considered **reasonable and necessary** for them to achieve their goals.

Reasonable and necessary

The phrase 'reasonable and necessary' is essentially a criteria that the NDIS uses to determine what funding people are eligible to receive. The good news is that, once you understand what it means and how it's applied by the NDIS, the term can actually be used to your advantage to help your customers get the funding they need to achieve their goals.

To be 'reasonable and necessary', the support they're requesting must be:

- directly related to their disability;
- represent value for money;

- help them achieve the goals and aspirations they identified in their NDIS Plan;
- connect them to their community, either socially or economically;
- use established, science-based methods and be likely to provide a real benefit; and
- not be a substitute for something which should reasonably be funded or supplied by other parties.

You can find more detailed information about what is 'reasonable and necessary' in this [blog](#).

What is included in an NDIS plan?

NDIS plans are as individual as NDIS participants. Because everyone's different, with different goals, different needs, different levels of support already in place, and different priorities, every NDIS plan will reflect their unique situation.

In terms of structure, however, all plans share some common features. Let's have a closer look at what an NDIS plan looks like, what categories of supports the plan covers, and what each category means.

An NDIS plan consists of three sections:

Your profile

This talks about the NDIS participant and their day-to-day life, including where they live and their family and friends. It also states their 'services and community involvement', which are the supports they receive from the community or other government services.

Your Goals

This uses the information gathered at their planning meeting to describe their goals and aspirations. Their goals are broken up into short-term goals - what they need right now - and medium and long-term goals - the bigger things that they're working towards over the course of their NDIS journey.

Your Funded Supports

This section states your supports which are funded through the NDIS, and also states the budgets the NDIS has assigned for each type of support.

Check our [Resources web page](#) to read an example of an NDIS plan.

Types of supports

There are three types of supports offered under the NDIS: Core Supports, Capital Supports and Capacity Building Supports. Each of the support categories for which the NDIS provides funding will fall under one of those support types.

Type 1: Core Supports

Core funding is funding intended for fundamental supports that enable people to live their daily lives. This funding is quite flexible, so it can be spent on any of the four categories listed below, but it **can't** be used for things that are covered by the other two funding types.

1.01 Assistance with Daily Life is designed to help NDIS participants be as independent as possible. It covers support with household, personal care and domestic tasks. This includes things like meal preparation and delivery, cleaning or garden maintenance, assistance with showering or dressing, or managing your medical needs. Respite care also comes under this category.

1.02 Transport Allowance may be available to people who can't access public transport because of their disability, so that they can access the supports they need outside their home. Usually paid as a fortnightly or monthly allowance, it helps cover the cost of transport that suits their particular needs.

1.03 Consumables is for the supplies your customer uses every day and which they need because of their disability. It's helpful to think of these as 'off the shelf' purchases. This category covers things like HEN products, continence products and colostomy bags and dressing aids, but doesn't cover daily medication or things like iPads.

1.04 Assistance with Social & Community Participation provides support for people to participate in community, social and recreational activities. The cost of the actual activity is rarely covered but NDIS participants can apply for funding to get the support they need to participate. So for instance, concert

tickets or entry to the local swimming pool may not be covered, but it may be possible to get funds for a translator or a support person to help with access. So, you've had your planning meeting and received your brand new NDIS plan – but what does it all mean? Let's take a look at the three sections of your plan and what each covers:

Type 2: Capital Supports

This funding type is best thought of as the more significant, 'one off' investments in specific items, accommodation or home modifications people may need to support them in their daily living. This funding is not flexible – funds are provided for a specific purpose, and that's what it must be spent on. Two categories fall under Capital Supports:

2.05 Assistive Technology is technology or equipment which assists people in their daily life and achieving their goals. This covers things like wheelchairs, prosthetics and orthotics, portable hoists, vehicle modifications, braille resources and even guide dogs.

2.06 Home Modifications and Specialised Disability Accommodation is funding for accommodation, or modifications to accommodation, which allow people to be more independent in their daily life. It may allow them to claim back money they spend on things like rails or ramps at home, or provide funding to either rent or develop disability-friendly – Specialist Disability Accommodation (SDA) registered – accommodation.

Type 3: Capacity Building Supports

This type of funding is designed to support people in becoming more independent. It covers things that will help NDIS participants build their life skills, enjoy more social or community engagement, or find and keep a job.

There are nine Support Categories in this area below. Budget can't be moved from one category to another, but it can be spent on anything within the category for which the funds were allocated.

3.07 Support Coordination will help your customer put their plan into action by helping them find and connect with service providers who are the best fit for their situation. You can find out more about Support Coordination [here](#), and what it means for you as a service provider, and how you can join Plan Partners service provider network, [here](#).

3.08 Improved Living Arrangements is designed to help people to find, secure or retain accommodation that is suitable for their needs. This can include anything from going to inspections, finding appropriate group homes, helping with the transition to more independent living, or negotiating contracts for tenancy or residence.

3.09 Increased Social & Community Participation is designed to help people acquire the skills they need to participate more fully in the community. This category includes things like funding for study, life skills training, sports coaching or training that is required for employment.

3.10 Finding and Keeping a Job is funding for support for people to successfully get, or keep, employment, like assistance with preparing a resume or support with interviews. It covers situations from school-to-work transition, to getting back into the workforce after a period away.

3.11 Improved Relationships is for support that can help your customer make positive changes to thinking or behaviour so that they can achieve their potential in life and relationships. It includes funding for services like psychology and behavioural therapy.

3.12 Improved Health and Wellbeing is funding for activities which help support, maintain or increase a person's physical mobility or wellbeing. It covers a whole range of things, from dietitians and exercise physiologists to personal trainers.

3.13 Improved Learning is funding to help with the transition from school to further education. It might provide advice, assistance with making arrangements, or support through the orientation process.

3.14 Improved Life Choices is a broad category which is designed to help people manage their NDIS supports. It includes support to help build financial or organisational skills and also includes Plan Management, a service NDIS participants are entitled to receive to help them manage the paperwork and admin related to their NDIS Plan. Plan management also makes it easier for you to work with customers who have an NDIS plan, whether you're registered with the NDIS or not. Plan Partners provides Plan Management services – you can read more about Plan Management [here](#) and find out what it means for you as a service provider [here](#).

3.15 Improved Daily Living is designed to help people develop basic skills they need to get more from their day-to-day life. It includes funding for things like physio and OT, massage, speech therapy, early childhood intervention strategies and some group therapy.



Step 3: Registering with the NDIS – or not

To register or not to register? It's a dilemma many service providers face. You may want to provide supports to NDIS participants, but are unsure how difficult or time-consuming the registration process is. Here, we unpack some of the details so that you can make an informed choice.

Since its inception, the Government's National Disability Support Agency (NDIA) which administers the NDIS, has asked service providers to officially register with them. It gives them information about the people providing services to their participants and allows registered service providers to lodge invoices directly with the NDIA for payment.

The registration process takes time, money and effort, though. And those are things many people simply don't have a lot of. As a result, many providers – particularly smaller businesses – choose not to register and are therefore classified by the NDIA as 'unregistered' providers*.

Of course, many of those providers are highly skilled, passionate and dedicated to making life better for people with a disability. And the good news is that there's no reason for NDIS participants to miss out on the amazing supports you can offer if you choose not to register.

Providing services to NDIS participants as an unregistered provider simply means that you can't lodge your invoices directly with the NDIS for payment. Instead, you'll have to send the invoice to your customer for them to pay. They'll then have to claim that money back from the NDIS, via the NDIS portal, which can be a hassle.

That's where Plan Management, through a provider like Plan Partners, comes in. With Plan Management, an NDIS participant can choose to use their NDIS funds to access services from any provider, whether they're registered or not, but not have to deal with the administrative hassle. Because we handle all the invoices and organise the payments via the NDIS, it frees both you and the participant from a whole lot of time-consuming and tricky paperwork...and makes sure you get paid promptly.

Click [here](#) for more information about unregistered and registered providers.

* Just a note – the terms 'registered' and 'unregistered' can create a bit of confusion, so if you choose not to register with the NDIS it's important that you explain to NDIS participants that the registration is purely administrative – it doesn't mean you're a 'second-class' provider or that your service can't be fully funded by the NDIS.



Step 4: Getting my organisation NDIS-ready

Providing supports to people with disability is something many businesses and organisations are passionate about. Under the NDIS, people with disability can access a whole range of services which will help them meet their needs and achieve their goals in life.

If you would like to provide those supports under this exciting new scheme, there are a few things you need to consider.

Education: The key to success

Change is always challenging. But it can be enormously exciting. Getting the right information, and making sure that both you, your team and your customers are fully informed and educated is vital to a successful and positive experience for everyone.

For some people, the NDIS can be a complex system. Getting your head around it can take time and effort. Then, you need to make sure not only you, but also the rest of your team, understand the NDIS too, so that you can all provide the best help and support to your customers.

Plan Partners can help with this process. The Plan Partners [website](#), our series of [blog posts](#) from NDIS specialists and participants, and our range of easy to understand [resources](#) (including plain English versions) provide a wealth of information designed to help you, and your customers, get the most from the NDIS.

If you're part of our [Plan Partners Service Providers Network](#), we'll regularly send you our

email newsletter with all kinds of up-to-date and handy information about how to work with the NDIS.

The NDIA also runs regular information sessions and workshops throughout the country, so a session with your staff is an easy way for them to understand the system, and how it will impact on the way they work.

Plan Partners runs regular information sessions around the country for our Service Provider Network, to help businesses like yours navigate the NDIS system. We'd even be happy to arrange to come out to your business, if required, to make sure you and your people are up to speed.

If you have questions or need to know more about any specific aspect of the NDIS, our Plan Partners team is always available via phone on 1300 333 700 or by email at info@planpartners.com.au.

Promoting your business: make sure that people can find you

So you want to provide services to help NDIS participants achieve their goals in life... but how do you make sure they can find you?

When NDIS participants are looking for service providers to provide them with the supports they need, there are a number of places they can go to look.

Support Coordinators

For many people, Support Coordination is one of the most helpful services available. Essentially, Support Coordination involves having a professional help an NDIS participant find and connect with local service providers that are the best fit for their needs. So make sure that Support Coordinators in your area know of your organisation and the services you deliver.

Local Area Coordinators

If NDIS participants don't have Support Coordination in their plan, their Local Area Coordinator (LAC) should be the first one to go to when they need support with finding service providers. A LAC can supply them with a list of service providers in their area to get their plan started. So as a service provider, make sure that the LACs know of your existence.

Plan Managers

There are many benefits of Plan Management - one of which is that some Plan Managers (such as Plan Partners) can provide their customers with advice on how to best find service providers in their area. Signing up for Plan Partners' Service Provider Network allows you to be part of a large network of service providers all around Australia.

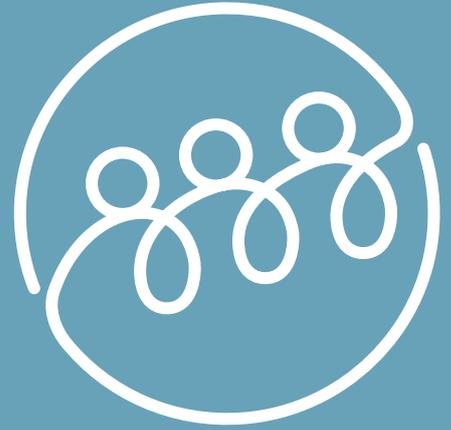
Online directories

The NDIS Portal contains lists of service providers, but it can be easy for NDIS participants to lose their way as they navigate through thousands of providers.

Luckily, there are some websites that can help them sort through the sea of providers and remove some of the mystery and confusion around the supports on offer. Directories such as Clickability and MyCareSpace provide overviews of each service provider, including handy ratings and customer reviews to give you a sense of how others have found their experience.

Advertising your business

Even though the disability sector relies on word of mouth mostly, advertising your organisation can be very beneficial to ensure more people get to know you. At a minimum make sure that your organisation is easy to find on Google, engage with people on your Facebook page and attend expos and events in your area. You might also like to consider advertising in local press or national magazines such as Source Kids and Link Disability Magazine.



Step 5: Working with NDIS participants

Setting up Service Agreements

Once an NDIS participant has chosen you to help them achieve their goals by providing supports to them under the NDIS, the next step is to set up a service agreement between your new customer and you.

Setting up service agreements with your customers is a way to confirm when and how the support will be provided, and what costs and fees they may need to pay to you for those services.

Your service agreement will confirm when and how the support will be provided, and what costs and fees they may need to pay.

Basically, it covers:

- Who is making the agreement
- How does the agreement fit in with the NDIS?
- What supports will be provided
- What is expected of the NDIS participant (your customer)
- What is expected of the service provider (you)
- How payments will be made
- How changes can be made to the agreement
- How the agreement can be ended
- What to do if there is a problem

- GST (and whether it applies)
- Contact details for both service provider and NDIS participant
- Signatures of both service provider and NDIS participant

Once the service agreement is drafted, make sure you take time to check it carefully and go through it with your customer. It's important you're both happy with the agreement before it's signed. This will protect both you and your customers, should any dispute arise in future.

The NDIS has a [very handy guide](#) which will take you through the process of how to set up a service agreement with an NDIS participant and what information you should include. If you're still unsure about anything, just call the friendly Plan Partners team on 1300 333 700.

Joining the Plan Partners Network

You can also join the Plan Partners Service Provider Network. We can help you streamline the invoicing and payment process, and give you access to a dedicated [online dashboard](#) to help you keep track of all your customers, the services you've provided, and the status of your invoices.

It's easy to join the Plan Partners network – just click [here](#) to access our sign-up form.

Part of the application to join our Network is signing a copy of our Provider Participation Terms. While it's not compulsory to sign up to these terms, we do encourage it. Laying out the terms of our arrangement helps protect everyone involved...and it will help make sure your invoices are paid promptly and regularly.



Step 6: Getting paid under the NDIS

It's quite common for service providers to worry that the complexity of the NDIS will make it difficult for them to get their invoices paid. The good news is that there's no need to let this concern stop you from providing supports under the NDIS – it just takes a little time to set things up and make it easy.

The first step is to make sure you understand where your services fit within the NDIS support categories (see [step 2](#)) and what will be considered 'reasonable and necessary' for your customer.

Then, it's simply a matter of setting up your invoice to make it easy for you to ensure the NDIS gets all the information they need to process your invoices promptly.

To help you set up your system in an 'NDIS-proof' way, we've prepared a handy [invoice template](#).

If you'd prefer to use your own existing invoice format, that's fine too – just make sure it

includes all the line items required by the NDIS (more on that in the next section!)

Getting paid by the NDIS is even more straightforward if your customers are using Plan Partners as their Plan Manager to manage their NDIS funds. We know the NDIS payment system inside-out, so we can simplify the process for you and help you get paid faster. You can check out our payment systems [here](#).

Plus, if you join Plan Partners Service Provider Network, you'll have access to your own, personalised [Online Dashboard](#), which will allow you to see all the invoices in our system for your customers on the NDIS, and to check the progress of payments.

Getting paid quickly and easily

One of the most important aspects of working with the NDIS is making sure you get paid. At Plan Partners, we know how critical cash flow is to your business. That's why we've made it a priority to help you get your NDIS payments as quickly and easily as possible.

Here are our Top Tips to help ensure you get paid without stress:

1. Break your price up into an hourly rate and include all the required information on your invoice. (See the checklist on previous page to make sure)

2. If a job might cost more than the NDIS will cover, be sure to raise this with your customer first, as the customer will have to pay the additional costs.
3. Make sure you have set up service agreements with your NDIS customers, and that both you and they are happy with the agreement. This will help protect both of you from any surprises and, hopefully, help avoid disputes.

Note: If you provide gardening, cleaning or handyman services, you'll find more helpful information just for you in this recent [blog](#).

How Plan Partners can help you get paid

When your customers are using Plan Partners as their Plan Manager to manage their NDIS funds, getting paid by the NDIS becomes a much more streamline process. Here's a quick outline of how the process usually works:



This [blog](#) explains exactly what each step entails.

Of course, there can always be instances where there are unavoidable delays in the payment of your invoice, but the friendly team at Plan Partners is on hand to assist you so that, together, we can help our customers bring their NDIS plans to life.

To help with prompt payment, we ask all service providers to provide clear and complete invoices that only include NDIS-funded services and are compliant with NDIS rules.

Not only is it fast and easy, the Plan Partners system is also transparent. You can log in to your [Dashboard](#) any time to send us invoices, see all the invoices in our system, check on

the progress of payments, update your details, or send us feedback or questions.

Fast Payment Option

If your business has a credit card terminal, you can use our Fast Payment service. This allows us to pay you as soon as your claim is successfully accepted by the NDIA, rather than having to wait for us to receive the funds first. That means you get paid faster, usually within five or six business days.

To find out more about Plan Partners' Fast Payment option, read our instructions on [how to get paid with Fast Payment](#) or email our team at admin@planpartners.com.au.



Step 7: Keeping track

Keeping track of your NDIS customers, the services you've provided, invoices you've sent and the progress of payments is important when you're working with the NDIS. By working with Plan Partners, you can make this easy.

Once you've registered with Plan Partners and joined our Service Provider Network, you'll have access to your personal Plan Partners Dashboard, where you can easily see and track the NDIS payments of your customers, anywhere, anytime.

Just log in via the [Plan Partners website](#) to submit invoices, view all the invoices already in our system and check on progress of payments.

Your Dashboard also allows you to quickly and easily update your details, send us your feedback, and make and track enquiries. It's easily accessible from computers, tablets and phones, so you can jump on anywhere, anytime.

Here's what you'll see when you log into your Plan Partners Dashboard

Submit an invoice

Easily upload your invoice in Word, PDF or Excel

Invoices

This table displays the status of your invoices for your plan managed customers, including the dates when Plan Partners has commenced processing, when the NDIS has approved or declined your invoice and when it is paid by us.

Organisation Details

Here you'll find your organisation's details, including your NDIS details. You can easily change your details here.

Customers

This is an overview of your customers who have Plan Management and/or Support Coordination with Plan Partners.

Enquiry History

This is an overview of the enquiries you have sent through your dashboard.

Payment Details

Your payment details are featured here – the method either being Fast Payment or Standard Payment.

Plan Partners Bringing your plan to life

Welcome Even Better Example Company BV

Welcome to your Plan Partners Providers Dashboard where you can easily see and track the NDIS payments of your customers, anywhere, anytime. From your Dashboard, you can submit invoices, view all invoices in our system and check on progress of payments. You can also update your details and send through any enquiries you may have. If you have any questions about the information provided, don't hesitate to contact our friendly team on 1300 333 700.

Submit an Invoice | I have a Question

Invoices

| Invoice Number | Customer | Invoice Amount | Invoice Date | Processing Commenced | NDIS Approved | Invalid / NDIS Rejected | Paid |
|----------------|----------------|----------------|--------------|----------------------|---------------|-------------------------|------|
| EXAMPLE56789 | Edward Example | \$ 520.00 | 13/09/2018 | 14/09/2018 | | | |
| EXAMPLE12345 | Edward Example | \$ 3,361.40 | 04/09/2018 | 05/09/2018 | 10/09/2018 | | |
| 123 | Edward Example | \$ 105.00 | 27/08/2018 | | | | |

View More

Organisation Details

| | |
|-----------------|--|
| Name | Even Better Example Company BV |
| Trading Name | |
| ABN | |
| Address | NSW 2000 |
| Phone | |
| Website | |
| Email | evenbetterexample@example.com.au |
| NDIS Regions | NSW |
| NDIS Categories | Consumables Coordination of supports Finding and keeping a job |
| NDIS Number | |

Edit

Customers

If you are also a support coordinator for a customer, you can login as them below.

| Name | Email | Phone | Mobile | Plan Management | Support Coordination | Dashboard Access |
|----------------|------------------------|-------------|--------|-----------------|----------------------|------------------|
| Edward Example | edward@example.com | 04689002255 | | Yes | Yes | |
| Stefan Fake | stefanbr@beerrutte.com | 0429638984 | | Yes | No | |

Enquiry History

| Case Number | Subject | Date | Status |
|-------------|---------|------|--------|
|-------------|---------|------|--------|

View More

Contact Details

| Edit | Name | Title | Email | Phone | Mobile |
|------|----------------|-------|-------------------------------|-------|--------|
| Edit | Robert Company | | robertdirector@example.com.au | | |
| Edit | Jaz Infinite | | evenbetter@example.com.au | | |
| Edit | Carol Accounts | | nick.forsyth@cludo.com.au | | |

New

Payment Details

| | |
|-----------------|----------------------------------|
| Payment Method: | Fast Payment |
| Email: | evenbetterexample@example.com.au |

Plan Management & Support Coordination

Plan Partners is passionate about empowering people with a disability to realise their potential and achieve their goals. We have the knowledge, resources and commitment to partner with people at every stage of their NDIS journey.

Plan Partners provides Plan Management and Support Coordination services.

Plan Management

Plan Management is a service which helps people manage the day-to-day paperwork and administration of their NDIS funds. All NDIS participants are entitled to have Plan Management included in their NDIS plan, at no cost to them.

Should an NDIS participant choose Plan Partners as their Plan Manager, they'll not only save time and stress, but will have an independent NDIS expert by their side throughout their NDIS journey. Here's some of the benefits NDIS participants can enjoy through Plan Management:

- **More choice**, with access to both NDIS registered and non-registered service providers.
- **Reduced administration** by managing the paperwork and ensuring your providers are paid.

- **Access to our network** of service providers in their area (you can find out how to join our network [here](#))
- **Keep track** of their spending and progress with monthly statements and their own personal.
- **Answer their questions** with plenty of online resources and the assistance of our friendly customer service team.

As a service provider, Plan Management can also be good for you, because when your customers are plan managed by Plan Partners, you can be sure their NDIS plans are being managed well and their invoices will be processed promptly.

Best of all, you will also get your own Plan Partners Online Dashboard, where you can quickly and easily see the invoices you have in our system, and check the progress of payments for each of your customers.

Support Coordination

Support Coordination can help people put their plan into action by helping them find and connect with service providers who are a good fit for their needs. And, if they're eligible, it won't cost them anything.

Plan Partners provides Support Coordination. That means we work with customers to understand their requirements, goals and what support they can access, then find and connect them with local providers who are

a good fit for them. We'll help them set up service agreements and be on hand to help resolve any issues they might have along the way.

If you are already providing services to someone who is transitioning to the NDIS, we may be able to help them set up an NDIS service agreement with you, so they can continue to work with the people they know and trust.

Why Plan Partners?

As Australia's leading expert in NDIS Plan Management and Support Coordination, we work with thousands of service providers all around the country, from sole traders to large health organisations. Our network of providers are all united by one thing: the desire to help others.

Here's what makes us different:

- **Expertise:** We have many years of experience in the disability and finance sectors. When your customers use our services, we will tailor everything to suit their needs. We can also help your business get NDIS ready with workshops and specialist advice.
- **Prompt invoice processing:** We process your invoices promptly. Your invoices are usually paid within 10 business days.
- **Large network:** We have a large network of service providers all over Australia - both NDIS and non-NDIS registered.
- **Independence:** We'll help your customers bringing their NDIS plan to life based upon what's best for them - not anyone else.
- **Accessibility:** You can check the status of your invoices any time using our online Plan Partners Dashboard. Our friendly team is on hand to answer all questions quickly.

Want to know more? Visit our website or call our friendly team on 1300 333 700.

Our Customer Charter

What we promise, we deliver.



1. You can always see and control how your budget is tracking.

You can see exactly how your budget is tracking at any time. You are always in control.

Each month we will send you a statement showing how your NDIS budgets are tracking. You can also see your funding details whenever you like by logging in to your personal dashboard on our website.



2. We welcome all your questions and feedback. We respond to you quickly, consistently and fairly.

You can contact us over the phone, by email or by writing to us. We will endeavor to get back to you within 2 working days and be consistent and fair in the way we respond.



3. We make sure your service providers are paid promptly.

You don't need to worry about your service providers being paid. As we process invoices promptly, they usually get paid within 10 working days.



4. We give you more choice of service providers.

We have a large list of NDIS registered and non-registered service providers. We are always adding to it and making sure it is correct. We talk to our customers to find out what they like and don't like about their service providers, and we use that information to build a better network for you.



5. When you need us, we will move quickly and always put you first.

We keep your information at hand so we can move quickly when you contact us and focus on what you need. If our customer service team can't help you, your enquiry will be directed to a State Manager.

Our aim is to keep our customers happy. At least once a year, we will ask you how we are doing in a survey. We will use your feedback to improve what we do.



6. We are independent and only work for you.

We only consider your needs when we advise you on how to spend your funds or select your providers. We don't take payments from anyone else or provide NDIS-funded services other than Plan Management and Support Coordination. We will also handle your personal information with care, in accordance with our Privacy Policy. You can find a copy of this policy on our website.

Every year, we are audited, so you can be sure we stay independent and unbiased.



7. Our people are well trained and informed.

You can count on us to have a deep and up-to-date knowledge of the NDIS, the disability community, Plan Management and Support Coordination.

All our people spend at least 20 hours each year learning and developing their skills through professional development. We also encourage our people to volunteer. We offer them 2 days extra paid leave each year to volunteer in the disability community.



8. We are committed to making the NDIS a success.

We are always talking to and working with members of the disability community, the NDIA and the government to make the NDIS a success.

We will share our knowledge of the NDIS by taking part in at least 10 industry expos and events each year and publishing at least 2 articles each month to help educate people about how to make the most of the NDIS.

**If you'd like to find more about
how we can support you,
please contact our friendly team.**

 **planpartners.com.au**

 **info@planpartners.com.au**

 **1300 333 700**