



Plan Management Information Booklet

An easy-to-read guide about the benefits of being
Plan-Managed and Rise and Shine Difference

*Creating a world of endless opportunities,
allowing you to reach your maximum potential.*

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WHAT IS PLAN MANAGEMENT?

Plan Management is, in its essence, similar to a bookkeeper.

A **Plan Manager** is responsible for:

- receiving invoices from a participant's supports;
- drawing down funds from the NDIS portal;
- remitting those funds to the organisation who have delivered the support service; and
- sending monthly statements showing expenditures to date and remaining balances.

HOW ELSE CAN I MANAGE MY FUNDS?

1 Plan-managed funding

The NDIA will provide funding in your plan to:

- *pay for a Plan Manager who pays your providers;*
- *help you keep track of your funds; and*
- *take care of financial reporting for you.*

2 Self-management

The NDIA provides you with funding so you can access the supports that will best help you achieve your goals.

3 NDIA (Agency)-managed funding

The NDIA pays providers on your behalf.

WHICH METHOD WORKS FOR ME?

When calling us to discuss **Plan Management**, it might be helpful to prioritise what is important to you in relation to how your NDIS plan is managed:

		Y	N
1	Will the support/service help you to achieve the goals in your NDIS plan?		
2	Is the cost of the support/service reasonably priced and is it the best value for money compared to other supports?		
3	Can you afford the support/service within your approved NDIS budget? <i>Remember, your funding needs to last the entire period of your plan.</i>		
4	Will the support or service help you to improve how you connect to your local community and improve the relationships you have with family and friends?		
5	Should the support/service be funded by other government services instead? <i>For example, dental, health or hospital services, education, housing and public transport.</i>		
6	Will the support/service help you to participate in activities with friends and other members of your community, or help you to find or keep a job?		
7	Is it safe? Your supports/services should not cause you any harm or put other people at risk.		

WHICH METHOD WORKS FOR ME?

When working out if **Plan Management** is for you, it might be helpful to prioritise what is important to you regarding how your NDIS plan is managed.

Rate each of these in terms of its importance to you (with 1 being the least important and 5 being the most important) by circling the appropriate number:

flexibility	1	2	3	4	5
choice & control	1	2	3	4	5
speed of processing	1	2	3	4	5
support options	1	2	3	4	5
able to track spending	1	2	3	4	5
relief from paperwork	1	2	3	4	5

WHAT ISN'T COVERED?

A support will not be funded:

- 1 If it is **not related to your disability**.
- 2 If you **have supports that are already funded** by a different governmental department, such as Medicare or the Department of Education.
- 3 For **day-to-day living costs** that are not related to your needs.
- 4 For **anything likely to cause harm** to you or pose a risk to others.

THE PROS & CONS OF PLAN MANAGEMENT

The PRO'S of Plan Management



You can access supports from **non-NDIS registered providers** (like small businesses providing gardening or cleaning services, allied health practitioners and mainstream service providers selling products that can be purchased using NDIS consumables funding).



You don't have to use the **NDIS online portal**.



You have a partner in navigating the NDIS and **someone to help you** make the most of your plan.



Plan Management is separately funded by the NDIS and is added to your plan, so it doesn't reduce your existing funding.

The CON'S of Plan Management



You have the choice and control of **Self-management**, without the administrative burden.



Everyone is eligible to be **Plan-managed**, you just have to ask.

HOW CAN I BECOME PLAN-MANAGED?

At your NDIS planning meeting, you will be asked how you would like to manage your plan.

You can specify a **Plan Management provider** (e.g. Rise and Shine Plan Management) at this meeting, or alternatively, you can appoint a **Plan Manager** once the plan is approved.

You can also switch to **Plan-Managed** from **Self or NDIA (Agency)-Managed** at any time.

Just follow the below 3 steps:

One:

Call the NDIS on **1800 800 110**.

Two:

Inform the NDIS representative that you would like to change your funds management to be **Plan-managed**.

Three:

Inform the NDIS that you want to nominate **Rise and Shine Plan Management** as your **Plan Manager**.



Managing an NDIS plan is hard work! Let us take care of the time consuming, stressful parts of managing your plan, so you don't have to.

Here at Rise and Shine Plan Management we know firsthand the challenges of managing and coordinating services and therapies alongside what seems like endless amounts of paperwork!

We are an **NDIS registered provider** of **Plan Management** across Australia. So no matter where you are located, we are available to support you.

The great news is, is that there is **ZERO COST** to you when you choose 'plan management' or 'Improved life choices' in your NDIS plan. The NDIS will provide additional funding to cover your plan management!

We manage all your NDIS related expenses and invoices. You have access to our secure online portal and app to help you keep track of your spending. There are no surprises!

We also provide you with monthly reporting AND we are backed by the leading NDIS software for Plan Management - Brevity Care Software.



WE ARE FAST

Fast processing of invoices.
We will process your submitted invoices within 2-3 business days



WE ARE REAL

Connect with real people who understand your needs each & every time you contact us.



WE ARE TRUSTWORTHY

All checks are in place to make sure your plan is managed in accordance with NDIS guidelines.



WE ARE FLEXIBLE

Offering you more flexibility in your choice of services providers - even ones that are not registered with NDIS.



WE KNOW PLAN MANAGEMENT FROM YOUR SIDE

Rise and Shine Plan Management was created as a branch of **Rise and Shine Disability Support.**

We have a unique view and experience with plan management having been the support providers as well as being mother's to children with NDIS Plans!

Here at Rise and Shine:

We KNOW what it is like to navigate the world with a disability.

We KNOW how hard it can be to find a good provider.

We KNOW the struggles of trying to manage your own NDIS Plan.

So, let us use our industry and personal experience to best help you!





Connect with Us!

PHONE:

0401 573 377 or 0405 924 792

EMAIL:

invoices@riseandshineplanmanagement.com.au

WEBSITE:

www.riseandshineplanmanagement.com.au

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