

## SD - Plan Management - Consumer Information

NDIS participants have three choices in how their plan is managed; self- managed, agency managed or plan managed. Under the plan management arrangement, most bills are paid directly by the registered plan management business. Participants have the same advantages of maximised choice and control as that of self-management participants but not the additional burden of paying the bills. A participant can choose NDIS registered providers or unregistered agencies. There is no need for you to access the portal. Only registered agencies of NDIA can provide plan management services.

Plan Management is a service provided by Headway but we also provide other supports such as Support Coordination and Direct Service Delivery. If you choose Headway for your plan management services you are not required to choose Headway for other funded NDIA activities within your plan. All activities selected are your Choice.

Our plan management team is available Monday to Friday, business hours are 9.00am until 5.00pm. If you are using our Plan Management service here a few useful tips.

Let the service provider know you are using Headway Gippsland Inc. for your Plan Management services.

Headway Gippsland Inc.

219 Princes Drive, Morwell

Or email [planmanagement@headwaygippsland.org.au](mailto:planmanagement@headwaygippsland.org.au)

Or phone 03 5127 7166

Please ensure that all invoices comply with Australian Tax Laws and NDIS requirements, this means that receipts received by us on your behalf must contain the following information:

- **That the document is intended to be a tax invoice**
- **The provider identity**
- **The sellers Australian Business number (ABN)**
- **The date the invoice was issued**
- **Line item number and description of service or items sold**
- **Quantity and price per item**
- **Day of service**
- **The GST amount payable (if any)**
- **The extent to which each sale on the invoice is a taxable sale**
- **Participant name and NDIS number**
- **Your EFT details for payment**
- **Ensure an email address is provided for remittance advice.**

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**If we receive invoices for you that don't meet the above requirements the invoice will be returned to you to discuss with the seller/provider and payments will be delayed.**

- We are happy to receive invoices via email or through the post and of course in person. This may mean in some instances we may be paying accounts directly that you have not signed. Unfortunately, we are unable to verify every account received from you or your provider that you have chosen for to deliver your services as specified in your NDIS plan. In this instance we suggest that you get providers to send you accounts directly and you sign these if you are satisfied and forward to us. If you have relationships with providers that you wish for them to send us the accounts directly even though you may not have viewed these please give them the above details.
- Plan managed participants can choose registered or non-registered providers but all invoices for payment will be made available to the NDIA for auditing so you need to ensure that invoices meet the above requirements and represent value for money. Even if you choose a non-registered provider to provide your services please consider the price per hour of the item. If you/your plan runs out of funding before the plan review the NDIA will want to know that what you purchased and the price that you paid was fair and reasonable in comparison to normal community standards.
- Once your account is received, we bill for the funds through your plan in the portal. Once we receive the funds from NDIA the account is paid.
- Invoices or accounts will be paid within 14 business days once everything is approved and verified.
- Your plan budget status can be provided to you at any time. Please be aware to not over spend the funds. Generally, approved funds need to last the life of the plan. If at any time your funds run out, your provider/the person whom you purchased services from cannot be paid.
- You can at any time check your balance in the Portal. Please ask our Plan Management team if you require assistance with this.

Refer to the NDIS for further information or updates

Please advise our Plan Management team if you would like to receive monthly statements, or if we can be of further assistance.

**Contact Us:** [planmangement@headwaygippsland.org.au](mailto:planmangement@headwaygippsland.org.au)  
03 5127 7166