

Plan Management

What **YOU** can expect.



Expert financial management for your NDIS plan

Plan management helps you handle the financial aspects of your NDIS plan, ensuring your funding is used effectively. At My Guardian, we offer expert plan management services that make it easy for you to access the services you need while we take care of the paperwork.

What we do

- ✔ Process invoices and pay your service providers on your behalf.
- ✔ Provide regular financial statements to track your spending.
- ✔ Help you manage your NDIS budget, ensuring your funds are used appropriately.
- ✔ Offer advice on how to maximise your NDIS funding and access the right supports.

Benefits of Plan Management

- ✔ **Time-Saving:** We take care of all the administration and paperwork, so you can focus on your care.
- ✔ **Financial Oversight:** Monthly statements help you track your spending and plan for future needs.
- ✔ **Expert Guidance:** We provide professional advice to help you make informed decisions and get the most out of your NDIS funding.



Why choose My Guardian for Plan Management?

We offer personalised support to help you maximise your NDIS plan. Our dedicated team collaborates with you to manage your funding efficiently, ensuring you receive the best services tailored to your needs. With our support, you can enjoy peace of mind while focusing on achieving your goals and enhancing your quality of life.

5 step checklist

To access disability care through the NDIS (National Disability Insurance Scheme), you must:

- ✓ Have a **permanent and significant disability** that affects your ability to take part in everyday activities
- ✓ Be under **65 years of age** when you apply.
- ✓ Be an **Australian citizen**, hold a **permanent visa**, or a **Protected Special Category visa**.
- ✓ Live in an area where the NDIS is available.

If you meet these criteria, follow the steps below to apply for the NDIS.

- 1 Confirm Eligibility**
 - Visit the NDIS website at www.ndis.gov.au or call **1800 800 110** to check your eligibility using the **Eligibility Checklist**.
 - You can also make an access request by calling the NDIS or completing a form online. Ensure you have your personal details and information about your disability ready.
- 2 Build your NDIS participant profile**
 - Register for the NDIS by providing your personal details such as date of birth, address, contact information, and medical records about your disability.
 - Request a translator or interpreter service if needed, to assist with communication during this process.
- 3 Meet with an NDIS representative**
 - After registration, an NDIS representative will contact you to arrange a planning meeting. This meeting may occur in person or over the phone.
 - During the meeting, you will discuss your goals, the support you need to achieve them, and the impact your disability has on your daily life.
 - Be prepared to provide evidence from health professionals, such as reports and assessments, that confirm the nature of your disability.
- 4 Receive your NDIS plan**
 - Based on the planning meeting, the NDIS will create an individualised **NDIS Plan** tailored to your goals and needs.
 - The plan will include approved supports and funding. You will receive a copy of this plan by mail or through the **myplace portal**.
- 5 Choose service providers and start your plan**
 - Once your NDIS plan is approved, use the **myplace portal** to search for registered NDIS service providers who can deliver the supports outlined in your plan.
 - Choose service providers based on your preferences and needs, then start receiving support.
 - If you need help managing the plan, you can request **Plan Management** services to assist with funding and coordination.

How to talk to your doctor about **Disability Care**

Files to take to your appointment:

1 Detailed disability assessment report:

Ensure you have copies of all assessments and diagnoses relevant to your disability. These can include physical therapy evaluations, occupational therapy reports, psychological assessments, and functional capacity evaluations. Each report should provide a clear understanding of your limitations and the types of support you require. Additionally, bring any supporting documentation that outlines your specific goals for disability care, such as increasing independence or improving quality of life.

2 Medication and treatment plans:

List all medications you are currently taking, including any supplements, and detail the dosages, frequencies, and prescribing healthcare providers. If you have a treatment plan from a specialist, such as a neurologist or psychiatrist, bring this document as well. You may also include details of any assistive devices or therapies (such as speech therapy, mobility aids, or respiratory therapy) that are part of your daily routine.

3 Functional needs overview:

Before your appointment, make a thorough list of the tasks that require support, such as personal hygiene, meal preparation, household cleaning, communication aids, and mobility assistance. Be specific about which tasks are challenging, how frequently you need help, and what kinds of assistance you prefer. For instance, if you require a personal care assistant for specific periods throughout the day, mention this in your list. You can also include any accommodations that you believe would enhance your independence.

4 NDIS participant information and funding details:

If you are enrolled in the NDIS, bring your participant number and any relevant documentation about your funding arrangements. This should include your most recent NDIS plan, any approved support coordination or plan management services, and details of your funding for core supports, capacity building, or capital supports. If you're new to NDIS, bring your eligibility assessment and any correspondence from the NDIS.

5 Support network and coordination contacts:

Bring a detailed list of the individuals involved in your care network, including family members, friends, support workers, and other carers. It's essential to include their contact information and specify their roles in your care. If you work with a support coordinator, plan manager, or case manager, make sure to have their contact details and any notes on current support arrangements. This information will help your doctor understand the broader context of your care and make appropriate recommendations.