



Client Infosheet: Plan Management

What a Plan Management service does

Plan Management services help people with the business aspects of their NDIS Plans i.e. to manage part, or all, of the financial processes related to their NDIS Plan.

The Plan Management services do the following specific tasks:

- Receive and check invoices after the Participant has approved their payment
- Claim money from your relevant NDIS categories on the NDIA portal
- Pay suppliers or reimburse you if you have already paid for approved resources
- Provide monthly statements, which list the funds used and remaining in each category of your NDIS Plan

Benefits of having a Plan Management service

- Peace of mind and more free time to spend on living life
- Ability to use providers who are not registered with the NDIA
- Assistance in tracking your NDIS Plan usage

Communicating with your Plan Management service at MDQ

Hiki Raureti is Muscular Dystrophy Queensland's Plan Management Coordinator. If possible, please make enquiries via email, and Hiki will respond as soon as possible. She is also happy to take phone enquiries, but you may need to leave messages and have her call you back.

- Email: services@mdqld.org.au
- Phone: 07 3243 9700

Payments to MDQ for PMP services

MDQ charges for Plan Management Provision according to the current NDIS Price Guide and Support Catalogue¹

Prices include:

- *A set-up fee* which is charged at the beginning of your NDIS Plan.
PLUS
- *A monthly Financial Administration fee* charged at the end of each month for the duration of your Plan.

Funding to pay for Plan Management is included in your NDIS Plan as Capacity Building Supports: Improved Life Choices. MDQ will claim these fees directly from the NDIS portal.

¹NDIS Price Guide and Support Catalogue: <https://www.ndis.gov.au/providers/price-guides-and-pricing>

The Process for obtaining funds to pay your suppliers

What you need to do:

The Service Provider/supplier provides you with an invoice

1. You check and approve the invoice
2. You forward the approved invoice to services@mdqld.org.au for payment. If there is an issue with using email, let your supplier and MDQ know asap. MDQ will adjust arrangements according to our capacity.

What MDQ does:

1. MDQ performs checks about whether
 - a. The invoice is within the parameters of your NDIS Plan
 - b. There are sufficient funds remaining in the relevant section of your NDIS Plan for that service
 - c. The invoice meets Australian Taxation Office's (ATO) standards
2. For approved invoices, MDQ lodges a payment claim with the NDIA portal
3. The NDIA makes a payment to MDQ for distribution to your supplier
4. MDQ pays your supplier.

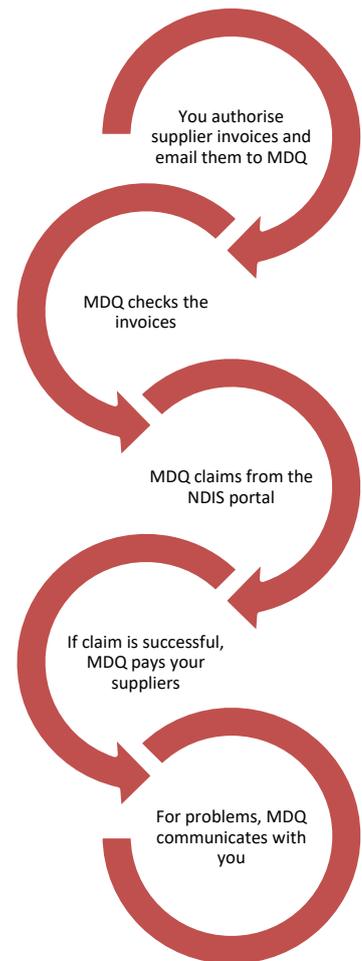
Points to note:

- MDQ will not pay any supplier prior to receiving funds from the NDIA.
- Method of payment is via electronic funds transfer (EFT) to the bank account nominated on the invoice.
- MDQ's payment terms are 14 days from receipt of the approved invoice so please ensure that you send the invoice to MDQ asap after you receive it from the supplier. We will endeavour to make all payments as soon as possible.

Your Relationship with your Service Providers and Suppliers

Some information and advice about appointing your service providers and suppliers:

- The service providers that you choose do not have to be registered with the NDIA however, they must comply with the maximum prices in the NDIS Price Guide and Support Catalogue. You can negotiate a price lower than the NDIS price in order to make your available funds go further in meeting your needs over the course of your plan, however the price you negotiate must be fair for the supplier
- It is advisable to download the NDIS Price Guide and Support Catalogue and familiarise yourself with the maximum prices which can be charged under your NDIS Plan
- MDQ recommends that you enter into written agreements with service providers and that these agreements are signed.
- Under the NDIS guidelines a provider cannot claim payment until after the agreed services have been delivered. An exception to this is for items that require quotes e.g. customised equipment.
- You, or your nominee, need to agree with the amounts being charged on invoices. We advise thoroughly checking the invoices issued to you to ensure their correctness. It may be appropriate to keep a diary of the details of services delivered as errors can be made when preparing invoices



Really important points to note

1. You are solely responsible for payments to suppliers which fall outside the scope of your NDIS Plan. If you are unsure about whether an item or service will be approved, you can call your NDIS Local Area Coordinator (LAC) or Support Coordinator and have a discussion about this before you commit to a purchase or service.
2. MDQ is responsible for seeking clarification about invoices which do not easily fit into the sub sections of your NDIS Plan or do not appear to be aligned with your NDIS goals. We may need to ask you to provide more information about the invoice and will record your explanation in case MDQ is audited by the National Disability Insurance agency (NDIA). Please remember that our Plan Management staff are not aware of your particular needs and any requests for clarification are required to ensure our accountability.
3. MDQ will sometimes refuse to claim from the NDIS portal as we assess that the payment does not fall within the scope of the NDIS Plan. If you disagree, you can appeal this decision to the NDIA via your Planner or LAC. If you provide written approval from the LAC or Planner, MDQ will make the claim.
4. MDQ takes no responsibility for making payments from its own resources to your suppliers
5. From time to time, MDQ may encounter problems in accessing the funds in your NDIS plans and in these cases, MDQ will make contact and work through the issues with you. Problems can result from one of the following:
 - a. The NDIA may have problems with its portal
 - b. There are sometimes discrepancies with the setup of the plan by the NDIS on the portal
 - c. You may have used all the funds in a particular section of your NDIS Plan and MDQ's Plan Management service is therefore unable to pay your suppliers. (MDQ also monitors Plan usage and provides feedback regarding funds remaining)
 - d. Every time your plan is changed it is cancelled and a new plan is issued. This can cause problems in accessing the funding from your expired plan to pay your providers. We will endeavour to work with you and the NDIA to resolve any issues quickly so that payment delays to your providers are minimised.
 - e. A service provider may make portal bookings which interfere with payments from other providers e.g. one disability support provider may undertake a portal booking for all of a Participant's Core Supports, however the Participant may have chosen to use multiple disability support providers.
6. Should you become aware at any stage of a new plan being issued, it is very important that you let us know as soon as possible to minimise any problems. The NDIA does not advise plan managers when an NDIS plan is renewed.

Keeping track of your plan

MDQ will provide monthly statements. These statements will be issued directly from Careview, our Plan Management software, to your email address. You can also request access to the Careview App so that you can see your balances and invoices at any time. Please contact services@mdqld.org.au if you would like access to the Careview App and we will send you a login.