



VersatilePlanners

NDIS PLAN MANAGEMENT

Participant Reading Handbook

A clear guide to your plan management service and Service Agreement



Important

This booklet is for reading and understanding. It is not the document you sign. Your separate Service Agreement contains the formal terms, plan management fees and pricing information.

Versatile Planners Pty Ltd

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How to use this handbook

This handbook explains the key parts of working with Versatile Planners as your plan manager. It uses plain language so you can quickly find the information you need.

Keep this booklet

Your signed Service Agreement is the formal contract. Keep this handbook as a quick reference alongside that agreement.

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Quick summary

We manage the money

We handle the financial administration for the NDIS funding that is plan-managed.

You stay in control

You choose your providers and remain involved in approving claims and monitoring your budget.

The contract is separate

Your signed Service Agreement contains the formal terms, fees and pricing schedule.



1.1 How this fits with the NDIS

HANDBOOK SECTION 1.1

Your NDIS plan includes funding for supports. If some of your funding is plan-managed, Versatile Planners can manage the financial administration for those plan-managed budgets.

- Plan management helps you manage NDIS funding and budgeting.
- You still choose your providers and the supports you receive.
- You remain responsible for making sure your funding is used for NDIS supports and does not exceed your available budget.
- Plan management is different from support coordination. A plan manager manages funding; a support coordinator helps connect you with supports and services.

Choice and control

Using a plan manager does not take away your right to make decisions about your providers and supports.



1.2 What plan management includes

HANDBOOK SECTION 1.2

Versatile Planners provides financial administration for your plan-managed NDIS funding. This can include:

- tracking your plan-managed budget and spending
- receiving and checking provider invoices
- checking that claims are in line with your plan, available budget and NDIS supports
- submitting valid claims through the NDIS provider portal
- paying providers or reimbursing you after NDIS payment is received
- keeping financial records and providing regular statements
- helping resolve invoice and payment issues.

Pricing

The plan management fees that apply to your service are shown in your separate signed Service Agreement and pricing schedule.



1.3 Our responsibilities

HANDBOOK SECTION 1.3

Versatile Planners agrees to provide plan management services in a professional, respectful and transparent way.

- explain how our plan management service works and agree on how invoices and approvals will be handled
- communicate openly and honestly with you
- protect your privacy and confidential information
- check invoices and claims for the information needed to process them
- seek your authorisation for claims in the way agreed with you
- track your plan-managed budget and let you know if spending is not on track
- keep accurate records of claims, invoices and payments
- provide regular financial statements and budget information
- pay valid provider invoices or reimbursements in a timely manner after NDIS funds are received
- help resolve payment disputes and explain why an invoice cannot be paid, where relevant
- meet applicable NDIS, privacy and consumer law obligations.

We may need to hold an invoice

We cannot process a claim if the invoice is not for an NDIS support, there is not enough funding available, required information is missing, or the claim does not meet NDIS requirements.



1.4 Your responsibilities

HANDBOOK SECTION 1.4

You, or your authorised representative, also have responsibilities when using plan management.

- understand your NDIS plan and the budgets that are available to you
- choose your own providers and manage your relationship with those providers
- make service agreements with your providers where appropriate
- give Versatile Planners accurate and current contact, plan and funding information
- tell us promptly if your NDIS plan is changed, suspended, replaced or your funding management changes
- authorise claims and tell us quickly if an invoice is incorrect or a service was not delivered
- make sure the supports you buy are NDIS supports and are in line with your plan
- monitor your spending and avoid overspending your available budgets
- tell your providers where to send invoices and provide any information we need to process them
- contact us if you have questions or concerns about an invoice, payment or your plan-managed budget.

You stay in control

Your plan manager handles the financial administration. You remain in control of your providers, supports and service decisions.



1.5 Invoices, claims and payments

HANDBOOK SECTION 1.5

A typical invoice follows these steps:

- 1 Invoice received** – Your provider sends the invoice to Versatile Planners, or you forward it to us.
- 2 Invoice checked** – We check the invoice details, your available budget and whether the support can be claimed.
- 3 Approval** – We obtain your authorisation in the way agreed with you.
- 4 Claim submitted** – A valid claim is submitted through the relevant NDIS provider portal.
- 5 NDIS payment received** – The NDIS pays the approved claim to Versatile Planners.
- 6 Provider paid** – We pay the provider or reimburse you, as applicable.

Payment timing

Payment depends on a valid invoice, available funding, any required participant approval and the NDIS claim/payment process.

GST and pricing

Plan management services may be GST-free when the legal requirements are met. Provider invoices may include GST where applicable. The formal pricing and GST terms are contained in your signed Service Agreement.



1.6 Changes to your service

HANDBOOK SECTION 1.6

Tell us if something changes that affects your plan management service. This could include a new NDIS plan, a change to your funding, new contact details, or a different invoice approval process.

- We will discuss any changes with you.
- Changes to the formal Service Agreement should be recorded in writing where required.
- We may ask for updated consent or plan information so we can continue processing claims correctly.



1.7 Ending plan management

HANDBOOK SECTION 1.7

You can choose to change your plan manager. If you decide to move to another plan manager, please tell Versatile Planners and the NDIA so the change can be recorded correctly.

- The notice requirements that apply to you are set out in your signed Service Agreement.
- If Versatile Planners ends the plan management relationship, we will follow the notice period in your Service Agreement and current NDIS requirements.
- We will assist with a reasonable handover of records and outstanding invoices where required.

Current NDIS guidance

Plan managers are currently expected to give participants 28 days' notice if the plan manager ends the relationship.



1.8 Feedback, complaints and disputes

HANDBOOK SECTION 1.8

You have the right to give feedback or make a complaint. Raising a concern will not affect your right to receive respectful service.

Step 1 - Contact Versatile Planners



Versatile Planners complaints contact

Mohammed Ahmar Siddiqui | 0433 964 400 |
info@versatileplanners.com.au

We will listen to your concern and try to resolve it fairly and promptly.

Step 2 - External complaint options

NDIS Quality and Safeguards Commission - for concerns about the quality or safety of NDIS supports or services. Call 1800 035 544 or visit ndiscommission.gov.au/complaints

National Disability Insurance Agency (NDIA) - for issues about your NDIS plan, funding, NDIS decisions, portals or the NDIS system. Call 1800 800 110 or visit ndis.gov.au

Emergency

If someone is in immediate danger or there is a life-threatening emergency, call 000.



1.9 Advocacy and support

HANDBOOK SECTION 1.9

You can ask another person to support you when dealing with Versatile Planners. This may be a family member, friend, nominee, advocate or other support person.

- You can have a support person attend meetings or help you communicate with us.
- We may need your consent or evidence of authority before sharing your personal information with another person.
- You can ask us for information about independent advocacy services.



1.10 Emergencies and service continuity

HANDBOOK SECTION 1.10

Plan management is a financial administration service. If there is an emergency involving your health or safety, contact emergency services or the relevant support provider.

- Versatile Planners maintains business continuity and disaster management procedures for disruptions that affect our service.
- We will take reasonable steps to protect records and keep essential plan management functions operating.
- If a significant disruption affects invoice processing or payments, we will communicate with affected participants and providers where possible.

For immediate danger

Call 000. For urgent NDIS-related safety concerns that are not an emergency, contact the NDIS Quality and Safeguards Commission on 1800 035 544.



Contact details and important numbers



Versatile Planners Pty Ltd

Organisation ID: 4053544752

ABN: 17 682 857 058

Phone: 0433 964 400

Email: info@versatileplanners.com.au

Address: 11 Shaftesbury Drive, Epping VIC 3076



National Disability Insurance Agency (NDIA)

Phone: 1800 800 110

Website: ndis.gov.au

For questions about NDIS plans, funding, decisions, portals and the NDIS system.



NDIS Quality and Safeguards Commission

Phone: 1800 035 544

Website: ndiscommission.gov.au/complaints

For concerns about the quality or safety of NDIS supports and services.



Emergency services

Call 000 if someone is in immediate danger or there is a life-threatening emergency.

Need another format?

If you need this information explained, translated or provided in another accessible format, contact Versatile Planners.

About this handbook

This handbook is general information and should be read with your signed Service Agreement. If there is an inconsistency, the signed Service Agreement applies.

Information checked: September 2026

Key public information sources: NDIS plan management guidance, NDIS Quality and Safeguards Commission complaints information, and Australian Taxation Office NDIS GST guidance.