Leap in! ebook series

Working with a plan manager: A guide for Support Coordinators.

Leap in!

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A guide for Support Coordinators.

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Introduction.

Support Coordinators are one of the most important connections in the NDIS. You help participants understand their plans, coordinate their supports and build the skills and confidence to manage their own lives. That takes real expertise and it takes trust.

At Leap in!, we see our relationship with Support Coordinators as a genuine working partnership. When a plan manager and a Support Coordinator work well together, things are usually clearer, quicker and easier for the participant. Communication flows, budgets stay on track and problems get resolved quickly. When things are unclear or disconnected, the participant is the one who feels it.

This guide is written for you. It explains how plan management works, how Leap in! operates, what you can expect from us and how we can work together to get the best outcomes for the people you support.

It is not a marketing document. We have tried to be direct and practical. If something in your experience of working with us does not match what is in these pages, we want to know about it.

What this guide covers.

- How plan management works and what it does (and does not) include
- The roles of the plan manager and Support Coordinator, and how they fit together
- How Leap in! works with participants and the people around them
- Practical guidance on common situations that you may encounter
- How referrals work and what to expect after you refer a participant to Leap in!
- Answers to the questions we hear most often from Support Coordinators.

01 How plan management works.

What you need to know.

- Plan management is funded separately from other NDIS supports
- The plan manager pays invoices, tracks budgets and provides financial reporting
- Plan management does not direct how a participant uses their plan
- Plan management and Support Coordination work best when they communicate regularly.

What plan management is.

Plan management is a financial intermediary service. When a participant is plan managed, their plan manager helps with the financial side of the plan. This includes receiving and processing invoices, checking claims against the participant's plan and NDIS pricing rules, submitting claims, paying providers and providing the participant with regular statements and budget updates.

Plan management funding is approved separately from the rest of the participant's plan and sits under the Improved Life Choices support category. The participant does not pay for this from their own supports budget.

At Leap in! we refer to the participants we plan manage as **Members**.

What plan management is not.

Plan management is not support coordination and it is not case management. A plan manager does not tell participants how to use their plan, which providers to choose or what goals to work towards. Those decisions belong to the participant and in many cases the Support Coordinator plays an important role in supporting those decisions.

While plan managers can help by providing timely invoice processing and budget reporting, they do not decide the rules about what the NDIS will fund or what is considered reasonable and necessary. The NDIA sets these rules and plan managers are required to work within them.

A plan manager also does not advocate on behalf of the participant with the NDIA and is not responsible for arranging or monitoring supports. That boundary matters. When both roles are clear and respected, participants get the full benefit of both.

The three ways a plan can be managed.

It helps to understand where plan management sits within the broader picture of how NDIS Plans are managed.

NDIA managed.	Plan managed.	Self managed.
The NDIA pays providers directly. The participant can only use registered providers.	A plan manager handles provider payments. The participant can use both registered and unregistered providers.	The participant (or their nominee) manages payments themselves. The participant can use both registered and unregistered providers.

Plan management offers the most flexibility for participants. Because it opens up access to unregistered providers, many participants working with a Support Coordinator will have plan management in their plan. If a participant you are supporting does not currently have plan management, it is worth discussing at their next plan review.

What plan managers do:

- Pay approved invoices on behalf of our Members
- Track budgets and monitor spending
- Provide monthly budget statements
- Help with questions about using NDIS funds
- Make sure invoices meet NDIS rules before payment
- Take the pressure off Members by handling the financial admin of their plan.

What Leap in! does as a plan manager.

- Personalised onboarding, including Understand Your Plan and Budget Health Check sessions
- Monthly Budget Health Checks with alerts to help identify possible under or overspending
- Real-time budget visibility and practical tools through the award-winning Leap in! app
- Support for Members, their support crew and providers to help keep payments and plan administration running smoothly
- A wide range of free resources, including a weekly enewsletter, 20+ ebooks, and hundreds of articles and stories in our Knowledge Centre.

"When a plan manager is responsive and transparent, it makes my job a lot easier. I can focus on the participant, knowing the financial side is being looked after properly." – Support Coordinator, Queensland.

02 The plan manager and SC relationship.

What you need to know.

- Plan managers and Support Coordinators have distinct and complementary roles
- Clear communication between the two roles leads to better outcomes for participants
- A good plan manager makes your job easier, not harder
- You should be able to contact the plan manager directly when you need to.

Complementary roles, not competing ones.

The plan manager and the Support Coordinator are both working in the participant's interest, but from different angles. The plan manager focuses on the financial and administrative side of the plan. The Support Coordinator focuses on the participant's goals, their supports and services and their capacity to manage their own life over time.

In practice, these roles intersect regularly. A Support Coordinator often helps a participant decide which providers to engage. The plan manager then needs that provider's details to set up payments. When a service agreement changes, both parties need to know. When a budget is tracking low, the plan manager should be telling the participant and the Support Coordinator so that adjustments can be made.

How the roles fit together.

Support Coordinator	Plan Manager
Coordinates supports and services	Manages the financial side of the NDIS Plan
Helps the participant understand their plan and build independence	Pays invoices, tracks budgets, provides monthly statements
Connects the participant with providers and community supports	Checks every claim against the NDIS rules
Funded from the Capacity Building budget	Funded separately under Improved Life Choices
Works closely with the plan manager to keep budgets on track	Works closely with the SC to keep spending aligned with goals

What you should be able to expect from your plan manager.

As a Support Coordinator, you are working hard for your participants. A good plan manager should make your job easier. That means:

- Responding promptly when you have a query about a participant's budget or a specific invoice
- Proactively flagging budget concerns before they become a problem
- Being transparent about what has and has not been approved and why
- Processing invoices within reasonable timeframes so providers are not left waiting
- Being available to speak with you directly when you need more than a written response.

If you are regularly finding that your plan manager is not meeting these expectations, that is important information for your participant. Part of your role includes helping participants understand what good plan management looks like and supporting them to make informed decisions about who provides it.

A note on consent.

Plan managers are bound by privacy obligations. We can discuss a participant's plan and budget with you if the participant has given their consent for us to do so. In most cases, participants who have a Support Coordinator have already provided this consent when they set up their plan management. If you are finding that a participant's plan manager is not able to speak with you, it may be a consent issue worth checking directly with the participant.

At Leap in!, we make the consent process straightforward for participants and make sure our records reflect who they have authorised us to communicate with. If you ever have trouble reaching us about a participant you support, please contact our team directly and we will work through it with you.

03 How Leap in! supports your participants.

What you need to know.

- Leap in! provides plan management for over 14,500 people on the NDIS across Australia
- We are the largest plan manager in Queensland and in the top 10 nationally
- We have a dedicated team who know the NDIS inside and out
- Many of our team members have lived experience of disability
- We offer our Members ongoing support to understand and manage their plans.

Who we are.

Leap in! has been helping Australians get the most from their NDIS Plans since 2016. We manage plans for Members across Australia, with the largest concentration in Queensland, where we are the biggest plan manager in the state.

We are part of Attain Healthtech, which also includes Mable, Mable Direct and HomeMade. Being part of this group means our Members have access to a broader range of support options when they need them.

Our people before profit guarantee.

At Leap in!, our people before profit guarantee means our Members come first. It reflects our commitment to investing in better services and support for every Member, their support crew, families and carers.

Participants with complex needs.

We work with Members across the full range of disability types and support needs.

This includes Members with psychosocial disability, acquired brain injury, complex health needs, multiple co-occurring conditions and Members navigating significant life transitions such as leaving school, moving into independent living or returning to work.

Our plan managers are experienced with the nuances that come with more complex plans. If a participant you are supporting has a complicated situation, we are comfortable with that. If you need to talk through a specific scenario with us before making a referral, please reach out.

The Leap in! app.

Participants and their nominated support people can access the Leap in! app to track budgets in real time, view statements, update their goals and manage their plan details.

For participants who are working towards greater independence in managing their own plan, the app is a practical tool that supports that journey.

You can encourage participants you support to use the app as part of their own capacity building, particularly if one of their goals is to become more confident and independent in managing their NDIS Plan.

Do you know about Saltu?

Saltu is a free, easy-to-use platform that makes managing your invoices and payments with Leap in! faster and easier.

With Saltu you can:

- Create and submit NDIA compliant invoices online
- Confirm if a participant has available funding
- Have your invoices processed faster
- Track invoice status in real-time
- Export your full invoice and payment history.

Find out more about Saltu here.

04 Navigating common situations together.

What you need to know.

- Most issues are resolved quickly when the plan manager and SC communicate directly
- Budget concerns should be flagged early, not after funding has run out
- Invoice issues are often administrative and can usually be resolved quickly.

When an invoice is rejected or queried.

If we are unable to process an invoice, we will contact the Member and, where consent has been given, we will also notify the relevant Support Coordinator. Common reasons for invoice issues include:

- The line item doesn't match the support category or the Member's plan
- The claim is above the NDIS price limit for that support type
- The service date falls outside the Member's current plan period
- Funds have been exhausted in the current funding period
- The provider's registration details are not current or do not match our records.

Most invoice issues are straightforward to resolve once we have the right information. If you are finding that a particular provider is experiencing repeated invoice problems for a participant you support, it is worth a direct conversation with our team to identify the pattern and fix it.

A note about funding periods.

From 19 May 2025, all new and reassessed NDIS Plans include funding periods. This means the NDIA releases funds in stages across the plan, rather than being available all at once.

The NDIA has advised that payments cannot be made where a funding period has been exhausted. This applies even if funds will become available in a later period.

A note about claims timeframes.

From 1 December 2026 the window for submitting claims to the NDIA is reducing to 90 days from the date a support was delivered, down from the previous two years. This means a claim must be submitted to the NDIA within 90 days of the service being delivered, otherwise it cannot be processed.

When a Member changes providers.

When a Member changes providers, there are a few things to keep in mind from a plan management perspective. Old service bookings may need to be closed and new ones opened. If the previous provider has outstanding invoices, these should be processed before the service agreement ends. New provider details need to be provided to the plan manager before payments can be set up.

Letting us know in advance when a provider change is planned helps avoid gaps or delays in payment processing. We can work with you to make the transition as smooth as possible.

> “Leap in! actually picks up the phone. When I have a question about a participant’s budget mid-week, I don’t want to wait three days for an email reply. That responsiveness makes a real difference to how I do my job.” – Support Coordinator, South East Queensland.

When a Member is approaching a plan review.

Plan reviews are an important time for Members and plan managers can play a supporting role even though the review itself is conducted by the NDIA.

Before a review, we can provide the Member (and their SC) with a clear summary of their spending across the plan period. This information can be useful evidence in demonstrating how supports have been used and why certain funding levels should be maintained or increased.

If a Member's plan has ended and rolled over, or if they are waiting for a reassessment, it is worth checking in with us about how their current funding is tracking. Rolled-over plans can sometimes have mismatches between the Member's current support needs and what the existing plan covers.

When a Member turns 18.

Turning 18 is a significant transition in the NDIS. From that date, the Member becomes the primary decision-maker for their plan. This means the plan manager will communicate directly with the Member, not with parents or carers, unless the Member has given their consent for that to continue.

This often catches families by surprise. If you are working with a young person approaching 18, it is worth preparing them and their family for this change well in advance. Our Turning 18 and the NDIS ebook covers this transition in detail and is available to share with participants and families.

Good to know. You can find our Turning 18 and the NDIS ebook, along with other resources for people on the NDIS, carers and families, at leapin.com.au.

05 The referral process at Leap in!

What you need to know.

- Referring a participant to Leap in! takes only a few minutes
- Participants can sign up online, by phone or with your help
- We will keep you informed once your participant is set up
- You do not need to manage the onboarding process.

How to make a referral.

There are a few ways a participant can come to Leap in! through a Support Coordinator referral.

1. **Direct referral**.
   You provide the participant with our contact details and a recommendation to get in touch. The participant signs up through our website at **leapin.com.au** or calls us on **1300 05 78 78**.

2. **Assisted referral**.
   You help the participant start the sign-up process during a session, either online or by phone. This works well for participants who need a little extra support to get things moving.

3. **SC-initiated contact**.
   You contact our team directly to let us know a participant is likely to reach out. This is helpful if the participant has complex needs or if there is something we should know in advance.

What the participant will need to sign up.

- Their NDIS number
- Their plan start and end dates
- Contact details
- Bank details if part of the plan is self-managed.

What happens after the referral.

Once a participant signs up with Leap in!, we handle the setup process. This includes:

- Contacting the NDIA to confirm plan management details
- Setting up the Member's account and app access
- Arranging a welcome call where we talk through the new Member's plan and what budgets they have available
- Sending a welcome pack that explains how Leap in! works and how to get in touch
- Reaching out to establish any consent arrangements for communication with the Support Coordinator.

We aim to have the new Member set up and ready to receive services within two business days of sign-up. If you have referred a participant with an urgent need, please let us know and we will prioritise their onboarding.

Eftsure – protecting our Members and their providers.

The NDIA requires us to confirm the bank details of providers (including Support Coordinators) for Leap in! payments.

As a provider delivering services to a Leap in! Member, we need to verify and confirm your bank account details.

To do this, Leap in! has partnered with Eftsure, a trusted Australian verification service.

This quick, one-time check makes sure the bank details on your invoices match the account you'd like payments sent to. It only takes a couple of minutes to complete.

Keeping you informed.

Once a Member you have referred is set up with Leap in! and has given consent for us to communicate with you, you will be able to contact our team directly about their plan.

We will also proactively contact you if something is affecting the Member's plan that you should know about, such as a budget concern or a plan rollover.

We know that communication is one of the things Support Coordinators value most in a plan manager. We take that seriously. If at any point you feel communication about a Member's plan is not meeting your needs, please let us know.

Ready to refer a participant to Leap in!?

- Call us: **1300 05 78 78**
- Email us: **crew@leapin.com.au**
- Visit: **leapin.com.au**

06 Resources.

Staying up to date with the NDIS can take time, especially as rules, processes and guidance continue to change.

A good place to start is our NDIS changes page, which brings together the latest updates in one place. We recommend bookmarking it so you can quickly check for new information when you need it.

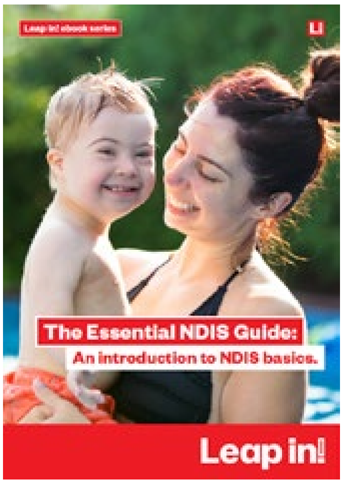
You can also explore our other practical resources, including guidance on what the NDIS may fund, answers to common NDIS questions, quick guides, forms, checklists and information sheets.

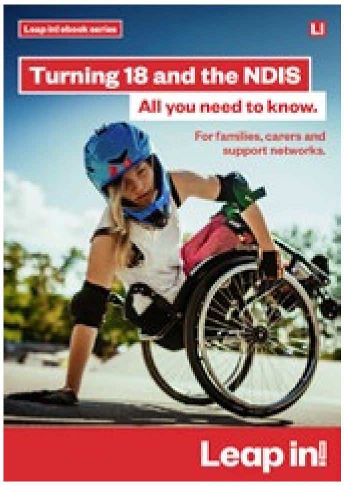
Helpful links.

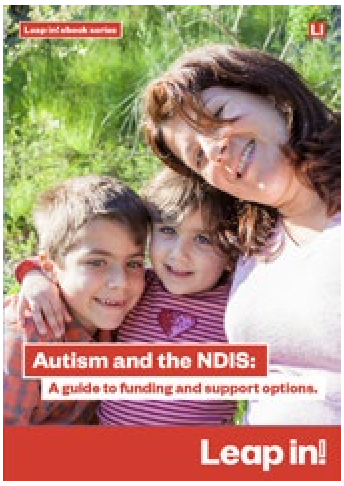
- For the latest NDIS updates: leapin.com.au/ndis/ndis-changes/
- What the NDIS may pay for: leapin.com.au/ndis/what-will-the-ndis-pay-for/
- Common NDIS questions: leapin.com.au/knowledge-centre/ndis-faqs/
- Quick guides, forms, checklists and info sheets: leapin.com.au/knowledge-centre/quick-guides-forms-checklists-info-sheets/

Our ebook series.

You can download or read our ebooks online – here is just a sample of what's available. Click the ebook images below or visit the Knowledge centre on the Leap in! website.







07 About Leap in!

At Leap in!, we are passionate about helping people get the most from their NDIS Plan.

We are the largest NDIS plan manager in Queensland and one of the top 10 nationally. Our team are knowledgeable, professional and over 60% have lived experience of disability. We truly understand the NDIS and the complexities of getting the most out of an NDIS Plan.

We are part of Attain Healthtech, alongside Mable and HomeMade, dedicated to helping people attain better outcomes.

Connect with us.

- Call us: **1300 05 78 78** (AEST)
- Email us: **crew@leapin.com.au**
- Visit our website: **leapin.com.au**
- Chat with us online: Available on our website, Monday to Friday 9am to 5pm (AEST)
- TY voice call: 133 677
- Speak & listen: 1300 555 727
- SMS Relay: 0489 997 044
- If you need an interpreter: Call 131 450 and ask them to call Leap in! on 07 3724 0368
- Via post: GPO Box 1744, Brisbane QLD 4001
- Our office hours are 9am to 5pm AEST, Monday to Friday.

Leap in!

Call **1300 05 78 78**

Email **crew@leapin.com.au**

Visit **leapin.com.au**

L! people BEFORE profit guarantee

The Leap in! Crew acknowledges the traditional owners of the land on which we work and live. We acknowledge the stories, traditions and living cultures of Aboriginal and Torres Strait Islander peoples on this land and commit to building a brighter future together.

At Leap in! we commit to being a safe and welcoming place for lesbian, gay, bisexual, transgender, queer, intersex, asexual and gender diverse (LGBTQIA+) people to work and to live as their authentic selves, without judgement, without discrimination and free from harassment.

Attain healthtech

Leap in! is part of Attain Healthtech, dedicated to helping people attain better outcomes.

Leap in! Australia | ABN 92 622 499 898 | NDIS Provider #4050030846