



How to switch to Plan Management with Plan Tracker



Changing plan manager may seem like a hassle, but it's a lot easier than you might think, in fact:

- Changing can be done in a few simple steps and at no cost to you.
- You keep full control of your plan at all times.
- You can change anytime, even mid funding period.
- Plan management funding will already be included in your NDIS plan.

Making the change to Plan Tracker is easy, just follow the guide below and we'll be with you every step of the way!



If you need help at any time or have questions, call us on 1800 549 670.

What is endorsing and why do I need to do it?

Endorsing is just a fancy way of saying that you need to officially tell the NDIA who you are choosing to manage your plan.

It's important because without being officially endorsed by you, we can't start providing services and making payments etc.

Switching is as easy as 1, 2, 3

You can switch to Plan Tracker Plan Management anytime:

- 1.** Endorse Plan Tracker by calling the NDIA on **1800 800 110** (or your NDIS contact), advising that you have selected Plan Tracker as your new plan manager, or via the my NDIS participant portal (see steps on the next page).
- 2.** Click the link below to sign up with Plan Tracker online or call us on **1800 549 670**.
- 3.** Enjoy the Plan Tracker difference.

[Sign up now](#)

Important details you will need when endorsing

- Your NDIS Number: You can view this on your plan
- Our full registered business name: Plan Tracker
- Plan Tracker ABN: **69 615 948 019**
- Plan Tracker NDIS registration number: **4050012016**

How to endorse Plan Tracker via the 'my NDIS participant portal'



1. Sign into your my NDIS participant portal.
2. Find your provider relationships and select 'my providers'.
3. Select your existing plan manager (if you have one), click on the drop down and select 'end role'.
4. Search for Plan Tracker (NDIS registration number **4050012016**), select us and choose the role plan manager when prompted (do not select plan provider).

If you need any help endorsing Plan Tracker, call us on 1800 549 670.

What to say when endorsing Plan Tracker over the phone

Here is an example of how to explain your choice to endorse Plan Tracker when contacting the NDIA on **1800 800 110**.

Hi,

I am calling to endorse a plan manager for my current plan.

I would like to endorse Plan Tracker as my plan manager for my NDIS plan. Plan Tracker's ABN Number is **69 615 948 019** and their NDIS registration number is **4050012016**.

Please endorse Plan Tracker from [plan start date], which is the start date of my current plan.



Email
hello@plantracker.com.au



Call us
1800 549 670



Live chat
plantracker.com.au