

Steps on how to change plan managers to Plan Manage Assist (PMA)



What the next steps are with your current plan manager:

- Send an email to your current Plan Manager and let them know that you are ending the service with them (please check on the service agreement in place regarding notice) please send an email and **request an end date** so you have this on file
- Please ask your current Plan Manager for an updated expenditure report and a list of invoices been paid so you have these for your records
- Let the providers know you will be ceasing services with the current Plan Manager (effective date) and send the [Provider Input](#) form to them so they know PMA is the new plan management provider

What the next steps are for Plan Manage Assist:

- Once you have given notice to your current plan manager, please advise PMA of the date
- Sign up with PMA online [click here](#) if you have an issue enquiries@planmanageassist.com.au
- Once set up, PMA will send you login details to access the budget etc

NB: Please ensure Plan Manage Assist is endorsed by the NDIA

- Company Name and registered with the NDIS is **Corcol Holdings Pty Ltd** trading as Plan Manage Assist.
- Provider number **4050027386**

If you have any queries, please call us 1300 199 960

