Welcome to Clear Funds Manager

A quick guide to what happens after you sign up, and how to use your plan management.

What happens after you sign up

1. We review your details - we manually review every intake submission and set up your Service Agreement.
2. We set you up with the NDIA - we register your plan with the NDIA on your behalf, so claims are directed to us.
3. You get your portal login - you'll receive an email with your own secure portal login once your profile is ready. This isn't instant - a real person checks everything first, so it typically takes a little longer than an automated signup.

What you can do in your portal

Live budget tracking: check your available funding and see your spending update in real time, from your phone or computer.
Monthly statements: get a monthly summary of your spending, in plain language.
Approve your own claims (optional): if you'd like to review and approve each provider invoice yourself before it's paid, you can turn this on. It's entirely optional - most participants are happy for us to just handle it.
Support coordinator access (optional): if you work with a support coordinator, you can choose to give them their own login to help keep an eye on your plan.

Using registered and unregistered providers

You're free to use any provider you choose - NDIS-registered or unregistered (as long as they hold a valid ABN). Ask them to send invoices directly to admin@clearfundsmanager.com.au; we process valid invoices within 3 business days of the relevant NDIS funds being received. If a provider is new to invoicing a plan-managed participant, point them to our Provider Invoice Guide on our website's Contact page.

Switching from another plan manager?

If you're moving to us from an existing plan manager, you'll still need to give them written notice to end that agreement (check their Service Agreement for the required notice period). We handle the NDIA-side transition on our end, so there's no extra paperwork for you there.

Questions?

Contact us any time at admin@clearfundsmanager.com.au. We're happy to help, whether it's your first time with a plan manager or you're settling in after switching.