# Plan management types - data rules

Contents

[Plan management types - data rules 1](#_Toc142295536)

[Plan management types possible values and rules 1](#_Toc142295537)

[How to use the data 3](#_Toc142295538)

[Example 1: How many participants in each age group choose to fully self-manage their plans? 3](#_Toc142295539)

[Example 2: Does the trend by age group from Example 1 change when disability group is ABI? 3](#_Toc142295540)

[About this document 4](#_Toc142295541)

## Plan management types possible values and rules

The data shows how the participants have chosen to financially manage their plan across locations and age groups. Each participant can choose between completely financially managing the plans themselves, financially managing some parts of it, choosing to use a plan manager, or having the plan managed by the Agency. How participants choose to manage their plan is based on their experience, capacity, and level of control they want over their plan.

| **Variable** | **Description** | **Rules** | **Sample Possible Values (example of quarter end dates)** |
| --- | --- | --- | --- |
| Rprt Date | Reporting date | * The dates will align with quarter end dates
 | * 30Sep2024
* 30Jun2024
* 31Mar2024
* 31Dec2023
* 30Sep2023
* 30Jun2023
* 31Mar2023
* 31Dec2022
* 30Sep2022
* 30Jun2022
* 31Mar2022
* 31Dec2021
 |
| StateCd | State/Territory where the participant currently resides | * “ALL” denotes all States/Territories in which the NDIA operates
 | * ACT
* ALL
* MIS
* NSW
* NT
* OT
* QLD
* SA
* TAS
* VIC
* WA
 |
| SrvcDstrctNm | Service District where the participant currently resides | * Each State/Territory is divided into service districts in which the NDIA operates
* “Unincorporated” and “Unspecified” are reported under “Other” commencing from 30-September-2020 reporting date
 | * TAS North
* TAS North West
* TAS South East
* TAS South West
 |
| AgeBnd | Age band of the participant | * “ALL” denotes all ages
 | * 0 to 6
* 7 to 14
* 15 to 18
* 19 to 24
* 25 to 34
* 35 to 44
* 45 to 54
* 55 to 64
* 65+
* ALL
 |
| MngmntMthd | How the participant has chosen to manage their plan implementation | * **Self-Managed Fully**: Participant has chosen to fully financially manage the plan
* **Self-Managed Partly**: Participant has chosen to self-manage parts of their plan with the remaining parts financially managed by the Agency or by a plan manager
* **Agency Managed**: Participant has elected the NDIA to financially manage their plan
* **Plan Managed**: Participant has selected to use a registered plan management provider to manage their plan financially
 | * ALL
* Agency Managed
* Plan Managed
* Self-Managed Fully
* Self-Managed Partly
* Not Recorded
 |
| DsbltyGrpNm  | Disability group of the participant’s primary reported disability | * The values of this field reflect the disability groups included in the quarterly reports published by the NDIA.
* Down syndrome is included in Intellectual disability
* “Missing” disability is reported under “Other”
 | * Autism
* Developmental delay
* Intellectual Disability
* Psychosocial disability
* ALL
 |
| PlanCnt | Count of eligible plans | * Trial participants are excluded for data on and before ‘RprtDt’ December 2019.
* Trial participants are included for data on and after ‘RprtDt’ March 2020
* Low plan counts have been modified along with any related data to protect the privacy of participants
 | * Numerical values greater than zero
 |
| AvgAnlsdCmtdSuppBdgt | Average Annualised Committed support  | * The value represents the average of the annualised amounts in the participants’ active plans (Total Annualised Budget divided by Participant Count).
* Amounts are rounded to the nearest thousand dollars
* For rows with 11 or fewer participants, the average budget has been removed, as the low participant count results in an average which is too volatile.
 | * Numerical values greater than zero
 |

## How to use the data

Below are two examples of how to use the data.

### Example 1: How many participants in each age group choose to fully self-manage their plans?

To get answer to this query, apply the following filters: RprtDt=”30JUN2023”, StateCd=”ALL”, SrvcDstrctNm=”ALL”, DsbltyGrpNm=”ALL”, MngmntMthd=”Self Managed Fully”

### Example 2: Does the trend by age group from Example 1 change when disability group is ABI?

To get answer to this query, apply the following filters: RprtDt=”30JUN2023”, StateCd=”ALL”, SrvcDstrctNm=”ALL”, DsbltyGrpNm=”ABI”, MngmntMthd=”Self Managed Fully”

## About this document

**Approved:** September 2024

**Contact:** scheme.actuary@ndis.gov.au