



Your guide to:

Self-management



This guide covers:

- what self-management is
- deciding if self-management is right for you
- learning to self-manage
- managing your supports.

How to use this guide

This guide will help you understand what it means to self-manage some or all the funding in your NDIS plan. It will help you decide if it's the right option for you.

If you're already self-managing funding in your NDIS plan, this guide will provide useful information, to help you get the most out of the process.

You can use this guide along with our other [participant booklets](#) including:



Booklet 2

Creating your NDIS plan

- Getting ready for your planning conversation
- Creating your NDIS plan
- Receiving your approved NDIS plan

Booklet 3

Using your NDIS plan

- What your plan includes
- How to use your plan
- How to choose and pay for supports and services
- How to prepare for your plan reassessment

Learn more about [self-management](#) on the NDIS website.

Some words we use in this guide are explained in the [glossary](#) on the NDIS website.



These booklets are available in different formats and languages other than English. Visit the [NDIS website](#) or call **1800 800 110** to request a copy.

What is self-management?

Self-management is when you, your plan nominee or child representative manage your NDIS funding. This means you have control over, and responsibility for, arranging and paying for the funded supports in your NDIS plan. It gives you independence, flexibility and choice when deciding what supports to buy to meet your needs and pursue the goals in your plan.

You can self-manage all or part of your NDIS funding.

One of the main benefits of self-managing is you can be innovative when choosing and arranging your support. It gives you the flexibility to try new things and change your supports, in line with what's in your plan. This can help you meet your needs with the best available supports.



Ways you can manage your NDIS funding

Self-management is one of three ways you can manage your NDIS funding.

1. Self-managed



You, your plan nominee or child representative, have control and responsibility for managing the funding in your plan. You arrange your supports and services and pay for them by claiming the money from your NDIS plan budget.

2. Using a registered plan manager



A registered plan manager pays your providers for you. They pay providers for the supports you purchase, help you keep track of your funds, and do any financial reporting for you.

3. NDIA-managed



You choose registered providers to deliver your supports and services and the NDIA pays your providers for you. This is sometimes referred to as Agency-managed funding.

You can request one of these options or a combination. For example, you might ask to self-manage some of your funding and have the NDIA manage the rest.



For more information about plan management options and what might work best for you, ask your My NDIS Contact before or during your planning conversation.

Learn more about the ways you can manage your NDIS funding with:

- [Booklet 2 – Creating your NDIS plan](#)
- [Our Guideline: Creating your plan](#)

Differences between plan management options

I can...	Self-managed	Using a plan manager	NDIA-managed
Have choice and control over the providers I use	✓	✓	✓
Use unregistered providers	✓	✓	No. Providers delivering services must be NDIS registered.
<p><u>Note: There are some supports you can only buy from a provider registered with the NDIS Quality and Safeguards Commission.</u> This includes specialist disability accommodation, behaviour support services, and any support where the provider is using or likely to use a restrictive practice.</p>			
Pay less than the NDIS Pricing Arrangements and Price Limits	✓	✓	✓
Pay more than the NDIS Pricing Arrangements and Price Limits	✓	No. Plan managers cannot claim more than the NDIS Pricing Arrangements and Price Limits.	No. Providers delivering supports cannot charge more than the NDIS Pricing Arrangements and Price Limits.
View my plan on the portal or app to keep track of my budget	✓	✓	✓
Manage bookkeeping and keep records of my spending	✓	No. Your plan manager will do this for you.	No. The NDIA will do this for you.

Is self-management right for you?

If you're thinking about self-managing your NDIS funding, there are benefits and responsibilities to be aware of.

The benefits of self-managing your NDIS funding include:



Choice

to decide what supports you purchase, who provides these supports, and how they are delivered - as long as it's in line with your plan.



Flexibility

to use both registered and unregistered NDIS providers that will best help you meet your needs and pursue your goals.



Power

to negotiate costs above or below the NDIS Pricing Arrangements and Price Limits so you can arrange your supports in a way that offers you the best value.



Capacity

to employ or contract staff directly or have someone employ staff on your behalf.



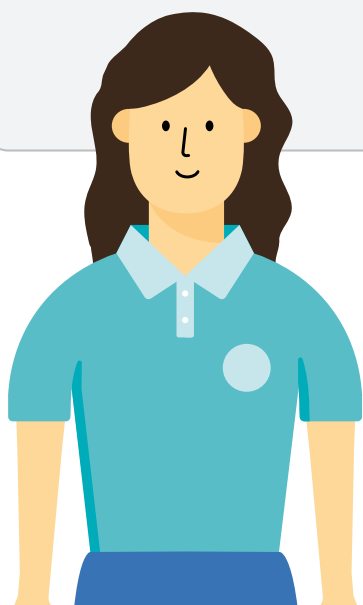
Control

over and responsibility for your NDIS funding so you understand and manage your budget, arrange and pay for your supports and keep the records and receipts.



Ability

to be innovative when arranging your supports. You are encouraged to shop around to work out which supports give you the best value and meet your needs and preferences.



Your responsibilities

The responsibilities of self-managing your NDIS funding include to:

- ✔ buy supports in line with what is included in your NDIS plan. These supports should be safe, good quality, related to your disability, and help you pursue your goals
- ✔ make agreements with your providers about the supports you will receive, including how they will be provided and paid for
- ✔ manage your budget so the costs of supports give you value-for-money and can be met within your budget for the duration of your plan. This means the cost is reasonable when you think about the benefit you will get, and you can afford to pay for the support within your plan budget, for the length of your plan
- ✔ pay for supports on time, by making accurate claims, receiving funding and paying providers
- ✔ keep records of invoices and receipts for 5 years to show that you have paid for your supports and used your funding in line with your NDIS plan
- ✔ meet your obligations as an employer if you choose to employ staff directly. This includes understanding the [NDIS Code of Conduct](#) that applies to workers and providers who deliver NDIS supports
- ✔ cooperate with payment reviews when you're asked to provide invoices, receipts or other evidence to show the NDIA that you've spent your funding in line with your NDIS plan
- ✔ advise us of any significant changes in your circumstances that may mean you can't meet your responsibilities as a self-manager.

You can still self-manage your funding even if you need some help to meet these responsibilities.

We can help you understand what self-management will mean for you, and the best way to manage your funding to meet your needs and circumstances. In your planning meeting, your My NDIS Contact will talk to you about how you would like to manage your NDIS funding. They can talk to you about the benefits of self-managing and help you identify any risks or areas where you may need extra support.

You can also:

- ask your friends, family, or service providers for advice
- talk to other participants and families about their experiences.

We'll talk to you about whether there are any [mainstream and community supports](#) which could support you. There are some great in-person and online self-management peer support groups that can provide suggestions and advice about self-management.

Bree and Mitch built their capacity to self-manage by starting small and learning what works best for them.



“Self-management allows us to look around our community to find out what works best for Dax and our family.”

Bree

Bree and Mitch self-manage their son Dax’s NDIS plan. Dax is a young surfer who loves to be around friends, play outside and ride his modified bike.

Dax’s goals in his NDIS plan include increasing his independence, communication, and participation in social and community activities.

Over 4 years Bree and Mitch have gone from self-managing part of Dax’s plan to all of it.

‘In the first few years we opted for the NDIA to manage Dax’s funding for equipment such as wheelchairs and walking frames. We are now self-managing this component.

‘I really like having direct contact with the supplier and managing the payments. I have also been kept up to date with delivery timeframes which previously I hadn’t.’

Bree and Mitch attended an NDIS workshop on self-management to get a better understanding of what they can use Dax’s NDIS funding for. This also gave them the building blocks to develop an administration process.

‘I use a basic spreadsheet to manage my claims, which has evolved over time.

‘We have also set up a separate bank account for my son’s plan and all payments go through this account. All invoices and receipts sit in a folder in my email.

‘I used to use the myplace portal but mostly manage claims through the NDIS app now. I find it efficient and so much easier and quicker to log into on the run. The app has made it easier to stay on top of the administration side of self-managing.’

Both Bree and Mitch appreciate the flexibility and control that self-management offers.

‘My confidence has increased in both my approach to self-managing and also understanding the funding system over time,’ says Bree.

Bree and Mitch suggest starting small if you want to give self-management a try but are unsure.

‘Have a plan before you go into self-management and perhaps just do one part of your budget. Learn about self-management through workshops and make it a part of your routine.’

What will help you self-manage?

You will likely be able to self-manage your NDIS funding well if you:



Shop around to find the right supports that offer you best value and are good quality



Learn about which type of supports, such as assistive technology, work best for you



Can manage money and keep good records



Understand your NDIS plan, so you can spend your funding in line with your plan and make sure your funding lasts for the duration of your plan



Can access and use a computer or smartphone to make claims in the portal or app.



How can you learn to self-manage?

If you would like to self-manage but need some help to build your skills and capacity to do it, there are lots of ways to learn and get support.

You can:



use this guide and the information about [self-management](#) on the NDIS website



connect with peer support networks and talk with other self-managers about how they do it



find organisations that provide training and support with self-management



talk to your My NDIS Contact or support coordinator about how to best set up your budget and supports.

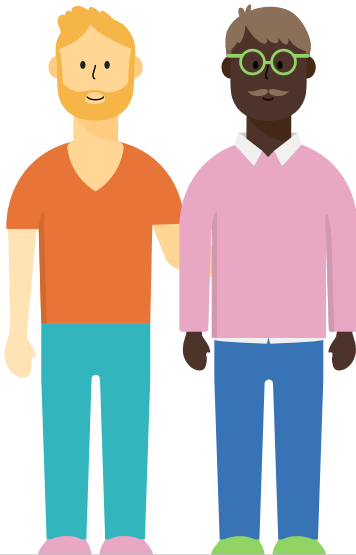


Trying self-management

You can choose a mix of options to manage your plan funding. For example, you can start by self-managing a small amount of your funding and have the rest managed by a registered plan manager or the NDIA. If self-managing works for you, you can ask to self-manage more of your funding at any time.

You can ask to change how you manage your NDIS funding at any time. There is no limit on how often you can request this change. If it's the only change you need to your plan, we can generally do a plan variation without a full plan reassessment.

Learn more about [changing your plan](#) on the NDIS website.



Informal supports

You may have friends or family who can help you self-manage. They might be able to help you set up your budget or negotiate prices with your providers.

They might be able to show you how to make claims, pay for your supports or keep receipts and invoices. There are also peer support groups and online networks for self-managers that support each other, share advice, tips and resources to make self-management easier.



Funded supports

If you need support to build your skills in managing your funding, we might be able to fund supports to help. Talk to your My NDIS Contact about this. If it meets the [NDIS funding criteria](#), we can include funding in your plan for capacity building and training in self-management.

You might use this funding to get your support coordinator or plan manager to help build your skills. You might choose to use the funding on training with another organisation. As you build your capacity in self-managing, you're likely to need less of this support in the future.

If you have enough money available in your core budget, you can also use this flexibly to help you learn how to self-manage. For example, you might buy bookkeeping services to help with payroll for staff you employ. Or you might buy an online training package to help with things like learning to budget and keeping records.

When can't you self-manage?

You will need to use a registered plan manager or have NDIA manage your plan if:

- you are currently bankrupt or insolvent under administration
- self-managing would pose an unreasonable risk to you.

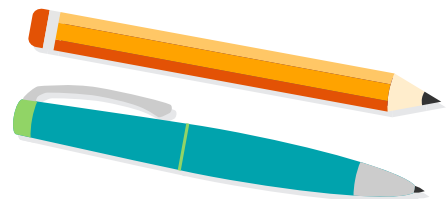
If you have a child representative or plan nominee, they can ask to self-manage your plan funding. We will approve the request unless:

- the child representative or nominee is an insolvent under administration
- allowing the child representative or nominee to self-manage would pose an unreasonable risk to you.

Bankruptcy and insolvency

Being bankrupt or insolvent is when a legal process decides you are unable to pay your bills when they are due. If you, your plan nominee, or child representative is bankrupt or insolvent, you can't manage your NDIS funding. You will not be able to self-manage if you fall into similar categories under the laws of another country.

If you are unsure if this applies to you, contact the [Australian Financial Security Authority](#).



Unreasonable risks

The [NDIS Act](#) and [Rules](#) say you can't self-manage your funding if this would create an unreasonable risk to you. Your plan nominee or child representative also can't manage your funding if that would be an unreasonable risk to you.

When deciding whether self-management would create an unreasonable risk to you, we think about:

- whether self-managing might cause any harm to you
- how vulnerable you are to physical, mental, or financial harm, and exploitation or undue influence from other people
- if you need support to make decisions and manage your money
- any supports you already have that may help you manage your money
- how well you have managed funding for supports and services in the past
- if you were previously bankrupt or insolvent under administration, how well you manage your money now
- if you have a court or tribunal order that someone else, such as a financial trustee or guardian, manages your money
- any deliberate misuse of, or fraud, in relation to plan funds, by you, your child representative or nominee.

Identifying risks does not mean you can't self-manage. Risks are only unreasonable if there are no suitable safeguards or supports available to manage the risk to you.

If you would like to self-manage but it puts you at risk, we'll work with you to identify ways to minimise the risk of harm to you. This might be supports or strategies that we can help you with. We could:

- fund supports in your plan to help you build your skills and confidence to self-manage
- approve you to self-manage a smaller part of your NDIS funding when you start out
- give you a shorter plan
- schedule regular check-ins with you.

Help from your informal supports might also minimise the risk of harm to you.

If there is an unreasonable risk to you, we'll talk with you about other options for managing your plan funding. You can still work toward safely self-managing in future if you want to.

When deciding if there's an unreasonable risk for your plan nominee or child representative to manage your funding, we think about:

- how good they are at managing money
- if they have a personal or other interest that might lead them to use your NDIS funding on other things
- if there is anything that can minimise risk to you.

You can learn more about how we make decisions about self-management in [Our Guideline: Creating your plan](#).

Understanding your plan

Once your NDIS plan is approved, you can see your plan and support budgets online using the myplace portal or my NDIS app. You'll also get a copy of your plan in the mail.

Your NDIS plan is divided into two parts: a statement of your goals and aspirations, and then the statement of your supports.

Your statement of goals and aspirations has information about you, your situation and the goals you want to pursue. Your statement of supports sets out the supports we funded in your plan.

Your statement of supports includes your approved supports and your goals. All supports included in your plan must meet the [NDIS funding criteria](#).

Support budgets

NDIS plans can include 3 types of support budgets:



Core supports

Supports for everyday activities.



Capacity building supports

Supports to help you build your skills and increase your independence.



Capital supports

Supports such as assistive technology, vehicle modifications, home modifications and specialist disability accommodation.



You can learn more about the [support budgets](#) on the NDIS website or in [Booklet 3 – Using your NDIS plan](#).

Support categories

The support budgets include different support categories. Your plan might include funding in one or more support categories. This will depend on your individual needs and may change each time you get a new plan.

You'll need to show which support category you're claiming from when you make claims in the portal and my NDIS app. You can learn more about the [support categories](#) on the NDIS website.

Supports listed in your plan as **fixed** or **stated** are not flexible. This means funding has been allocated for a specific support or service and can't be used for anything else.

A support in your plan can be listed as **in-kind**. This means the service has already been paid for by your state, territory, or the Australian government. When you use an in-kind support, the existing provider will deliver these supports. You will not need to pay for them with funding from your NDIS plan.

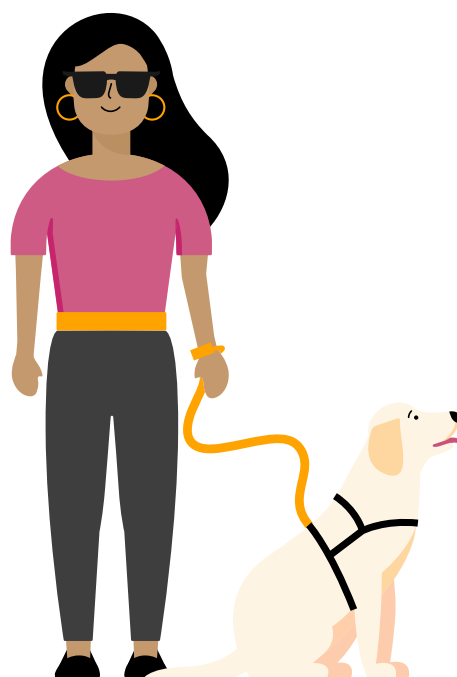
A support in your plan can be listed as **quote required**. This means you will need to give us extra information, like quotes or specialist reports, before we can include funding in your plan. When we approve the quote, that sets the maximum price you can pay for this support.

Supports you can only buy from a registered provider

You can only buy the following supports from a provider registered with the [NDIS Quality and Safeguards Commission](#):

- specialist disability accommodation
- specialist behaviour support services that provide behaviour support assessment or develop a behaviour support plan
- any support where the provider is likely to, or may need to, use a restrictive practice. A restrictive practice is any practice a provider uses that restricts the rights or freedom of movement of a person.

Your My NDIS Contact will discuss these supports with you if you need them. You can find more information about behaviour support and restrictive practices on the [NDIS Quality and Safeguards Commission](#) website.



What can you buy?

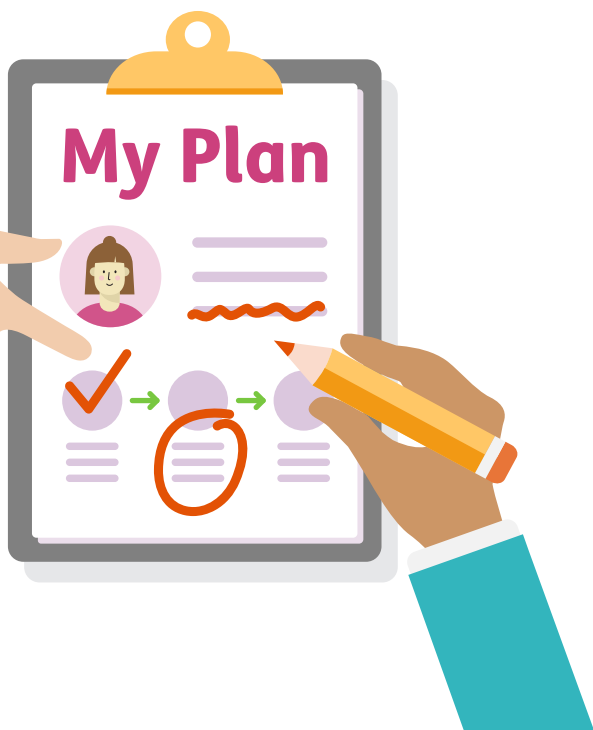
Once you understand your NDIS plan and support budgets, you can choose the supports you buy. We usually describe supports generally, so you have more choice in how to use your funding.

The supports you buy must be in line with the supports in your NDIS plan. Every person's plan is different, so the supports you can buy may be different to the supports someone else can buy.

When you receive your plan, it's a good idea to make a budget for the length of your plan. You can then keep track of what you spend according to your budget. This helps when deciding what to buy, and to make sure you can get the support you need for the length of your plan.

As a self-manager you can be innovative when working out how to best meet your needs and pursue your goals. You might find a new provider that better meets your needs or negotiate prices with your providers that save you money. With any savings you make, you might decide to purchase extra supports.

You may choose to engage your own staff when you self-manage. You can use your NDIS funding for costs directly associated with engaging your own staff. This might be for things like insurances and superannuation.



You can use funding in your core supports budget flexibly. This means you may choose to use some of it to pay for supports that help you self-manage. Such as:

- ✓ bookkeeping and accounting services
- ✓ employment services including support to recruit and manage staff and meet your responsibilities as an employer
- ✓ legal advice to make sure you are meeting your responsibilities when arranging your supports
- ✓ software applications
- ✓ support coordination and plan management assistance
- ✓ peer support organisation events or memberships.

You cannot use your NDIS funding to pay for:

- ✗ costs associated with services other government agencies provide, like school fees, Medicare gaps, dental costs, other health or hospital service fees
- ✗ supports that would usually be provided by your family or friends
- ✗ everyday expenses such as your groceries, meals out with friends, rent or utilities
- ✗ supports that may cause you harm or put you or others at risk
- ✗ expenses that are not related to your disability.

If you purchase supports that are not in line with the supports included in your plan, you may be required to pay this money back to the NDIS.

Can you buy it with your NDIS funding?

You'll need to use your NDIS funding in line with the supports included in your plan. The following questions can help you do this.

If the answer is 'yes' to these questions, the support is likely to be in line with supports included in your plan. If you are unsure you can talk to your support coordinator or My NDIS Contact.

Do you need the support because of your disability?

The support you buy must be related to your disability. You cannot use NDIS funding for day-to-day living costs such as rent, groceries or household bills.

Is the support likely to meet your needs?

You are encouraged to explore supports before deciding what to buy, so you can get the best support available to you. You can talk to your peers and networks about supports, try new things, and change your supports if you feel there is something that could better meet your needs.

Is the cost of the support reasonable?

Is the cost of the support reasonable when you think about the benefit of the support? It should give you good value for money compared to other options. You can choose to pay less and get more supports or pay more for a higher quality support if it best meets your needs.

Can you afford the support within your support budget?

Your NDIS funding needs to last for the length of your plan. The support you buy must fit into your budget. Work out your budget early so you know what you can afford. This will help you to track your funding and make decisions about any changes to your supports during your plan. You might like to use our [budget calculator](#) on the NDIS website to help you do this.

Is the support something that should be funded by the NDIS and not other government services?

The NDIS only funds disability-related supports. Other services and supports like dental, health or hospital services, education, housing, and public transport are all provided by other government organisations.

Is the support safe?

You cannot purchase supports that cause harm or put yourself or other people at risk.

Is the support legal?

The support you buy must be legal. The support must not break any Commonwealth or state or territory laws.

Parents Jennifer and Josh are thinking creatively to get the most from their sons' NDIS plans.



“Take the time to find a process that works for you and don't be afraid to make mistakes.”

Jennifer

Jennifer and Josh self-manage the NDIS plans for their young sons Henry and Connor.

Henry and Connor are both bubbly, energetic kids who love learning new things. Self-management has allowed them to source supports that are both good value and provide long-term benefit.

‘It is important to listen to what the boys want and how they wish to pursue their goals,’ says Jennifer.

‘Self-management has given us the control to make decisions on what we can do and which providers we can use.’

Henry has regular physiotherapy sessions to help build his strength, develop his confidence, and pursue his goal of running faster.

The parents also have personal trainer Robbie to provide fun and engaging in-home sessions.

‘Robbie's personal training sessions are half the price of physiotherapy, which means that Henry benefits from having more personal training sessions,’ says Jennifer.

Connor, who is hard of hearing, receives Auslan lessons at home with his family. These lessons allow him to learn signs around the house and in a way that works for him. This approach to learning has helped Connor learn 300 Auslan signs. The family also gets to be involved and practise Auslan too.

Jennifer and Josh also use NDIS funds to purchase materials for visual schedules. These use pictures to communicate information to the boys. This has proven to be a cost effective and creative support.

‘We are also building the capacity of supports around the boys. This includes having a deaf advisor attend physiotherapy sessions with Connor.

‘We also have our advisor attend pre-school for the same purpose as physiotherapy. The focus there is on providing strategies for the educators to connect with Connor but also for the other children to connect with him.

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‘It doesn’t need to be ongoing. A few sessions several times a year will build the educators’ ongoing capacity to support Connor.’

The parents have also used funds for training and workshops.

‘These have given us strategies and tools to build our own capacity and understanding as parents so we can better support our kids,’ says Jennifer.

‘I also did a parent workshop on NDIS self-managing, which gave me confidence that I can tick off the funding criteria for each claim we make.’

‘One of the best things we do is have coaching sessions with particular therapists, where it is us, rather than the kids. We can ask questions, raise concerns, plan ahead and problem solve one-on-one. You can achieve a lot in a 30-minute phone consult, and it’s less than a therapy session which is usually one hour.’

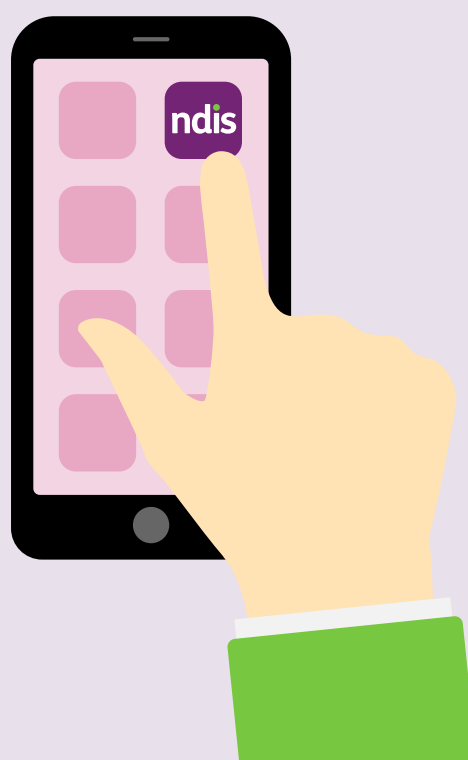
‘I like the flexibility, independence and control that comes with self-management,’ says Jennifer.

She also likes the ease of the my NDIS app, where she can claim for supports straight away.

‘I have our preferred providers saved in the app and recommend it to anyone interested in self-managing.’

“**‘I like the flexibility, independence and control that comes with self-management. I have our preferred providers saved in the app and recommend it to anyone interested in self-managing.’**

Jennifer



How much should you pay for supports?

As a self-manager, you are responsible for choosing how much to pay for your supports. You can negotiate the price of your support with your provider, and shop around to find the best value for you.

The [NDIS Pricing Arrangements and Price Limits](#) are used to set the funding in your plan. They can be helpful when you are working out what you are willing to pay for a support. Price limits are the maximum prices that registered NDIS providers can charge for specific supports.

You can negotiate prices that are lower than the prices in the NDIS Pricing Arrangements and Price Limits. You can also choose to purchase supports at a higher cost.

Remember, it's your responsibility to make sure the funding in your plan lasts for the duration of your plan.

It's a good idea to compare prices of similar supports from different providers to make sure you get the best value.

When deciding how much to pay for a support, consider:



Value for money

Is the cost of the support reasonable when you think about the benefit you will get? Are there other supports that still meet your needs and cost less?



Quality

Is the quality of the support high and will it help you pursue the goals in your plan?



Quantity

How much support will you need for the duration of your plan and how often will you need it?



Budget

How much funding do you have available in your NDIS plan, and can you afford the support within your budget?

Who can you buy supports from?

As a self-manager, you can choose which providers to buy your supports from. You can choose NDIS registered providers, or unregistered providers. A provider is a person, business or organisation that provides your support.

NDIS registered providers are regulated by the [NDIS Quality and Safeguards Commission](#). Registered providers must meet government quality and safety standards. This means registered providers are required to meet strict conditions for the quality and safety of their services. All providers (registered and unregistered) must adhere to the [NDIS Code of Conduct](#).

If you decide to use an unregistered provider, it's important you make sure they have the relevant qualifications, registration, training, insurance and safety checks. There is more information about worker checks for self-managers on the [NDIS Quality and Safeguards Commission website](#).

If they are a health professional, check that they are registered with the [Australian Health Practitioner Regulation Agency](#), or meet the standards of their professional body.



Three ways to buy your supports

1. Businesses and organisations

You can buy your supports from NDIS registered, or unregistered, businesses and organisations.

These providers will generally arrange your support and take responsibility for the support workers on your behalf. When you engage a provider, let them know they will need to give you a tax invoice for payment after you receive your support.

You can also buy supplies, assistive technology, equipment and other items from individuals, shops, and Australian or international online stores. For example, you might buy a second-hand shower chair from an online marketplace, or continence aids from a supermarket.

Learn more about buying assistive technology in [Our Guideline: Assistive Technology](#).

2. Self-employed contractors

You can hire a self-employed contractor, who is a person with an Australian Business Number (ABN) and is responsible for managing their own business. Self-employed contractors may or may not be NDIS registered providers.

For example, many support workers and tradespeople are self-employed contractors.

It's up to you to make sure a contractor has:

- relevant safety checks
- an ABN, or evidence they are exempt from quoting an ABN
- appropriate insurance
- the right qualifications and skills.

Contractors can charge per job or an hourly rate. They will give you either an invoice to pay for their service or a receipt to say you've paid. Invoices and receipts need to show the type of support, the date of the support, the amount, the cost and the contractor's ABN.

Some providers may not need to provide an ABN. In these cases, the provider can use a [Statement by a supplier](#) form. This means you won't need to withhold taxes when paying the provider.

3. Directly employing staff

You can choose to recruit, employ and manage the people who support you.

As an employer of staff, you will need to:

- make sure your staff have the right skills, qualifications, training and safety checks
- use your plan budget to meet the costs to recruit staff, pay their wages, superannuation and any insurances
- provide a safe place for them to work and ensure their health and safety while working
- seek advice or support when needed from professionals such as an accountant, financial advisor, employment agency or lawyer. These people can help you set up systems to pay appropriate wages, superannuation and insurances.

If you employ your own staff, you need to keep payroll records for your claims in line with your state or territory's requirements. Records include payslips, bank statements, payment of taxes and superannuation. You'll need to keep records for a minimum of 5 years.

Learn more in our guide to [directly engaging your own staff](#), on the NDIS website.

It is important to know how to work out if a worker is an employee or contractor for tax and superannuation purposes. The [Australian Taxation Office](#) website has useful resources to help you.

The [NDIS Workforce Capability Framework](#) provides information on the knowledge and skills that workers supporting NDIS participants should have.

Changing providers

If you're not happy with the support you're getting, or think you can get better value, you can change to another provider.

Worker screening checks

A worker screening check is a process managed by the NDIS Quality and Safeguards Commission to check that a worker is safe for you to use. Workers from registered providers should already have NDIS worker screening checks.

As a self-manager, you can ask providers, employees or contractors providing you with supports and services to do an NDIS worker screening check.

NDIS worker screening checks are available in each state and territory.

Self-managers can also request access to a national database to check if their providers, contractors or staff have the NDIS worker screening check.

You can learn more about NDIS worker screening checks and request access to the national database on the [NDIS Quality and Safeguards Commission website](#).



Making a service agreement

Self-managers are responsible for paying providers on time and meeting your agreed responsibilities with them. Providers are responsible for providing what's been agreed.

You're encouraged to have a service agreement in place with each of your providers. The agreement should outline what supports will be provided to you, and how the supports will be provided and paid for. Your provider may have their own standard service agreement, or you can create your own.

The service agreement is between you and your provider and is a contract under Australian consumer law. If you have issues with your providers, visit the [NDIS Quality and Safeguards Commission](#) website or the [Australian Competition and Consumer Commission](#) website for more information.

Learn more about [creating service agreements](#) on the NDIS website.

If you hire a contractor or employ your own staff, you will likely have a contract or employment conditions and agreements in place. In this situation you won't need a service agreement.

How do you pay for supports?

Once you've arranged your supports and providers, you'll need to pay for them using your NDIS funding.

As a self-manager, you're responsible for paying your providers, contractors and staff. The NDIA cannot pay your providers for you. If you don't pay your providers, they may stop delivering services to you, pursue debt recovery, or report your non-payment to the NDIA. If you can't keep on top of payments to providers, we may reconsider if self-management is right for you.



Payment options

As a self-manager there are 2 ways to pay for your supports with your NDIS funding.

1. Make a payment request and then pay your provider

After you receive an account, invoice or timesheet from your provider or staff, you can make a claim. This can be done online using the myplace portal or through the my NDIS app. Money from your NDIS plan budget will usually be paid into your nominated bank account within 1-2 business days. You can then pay your provider.

The instructions for the [My NDIS mobile app](#) will help you, your nominee or child representative, to access and use the app.

2. Pay your provider and then make a claim

After you receive your support, pay your provider using your own money and get a receipt. Make a claim to have the money from your NDIS plan budget paid into your nominated bank account. You will be reimbursed, usually within 1-2 business days.

Make sure the amount of your claim matches the invoice or receipt from your provider, or if you are directly engaging staff, your payroll records.

Remember, you can't make a claim before you receive your support.

Learn more on the NDIS website about how to [claim from your plan](#).

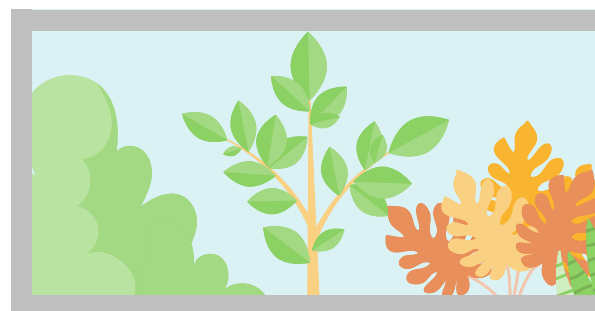
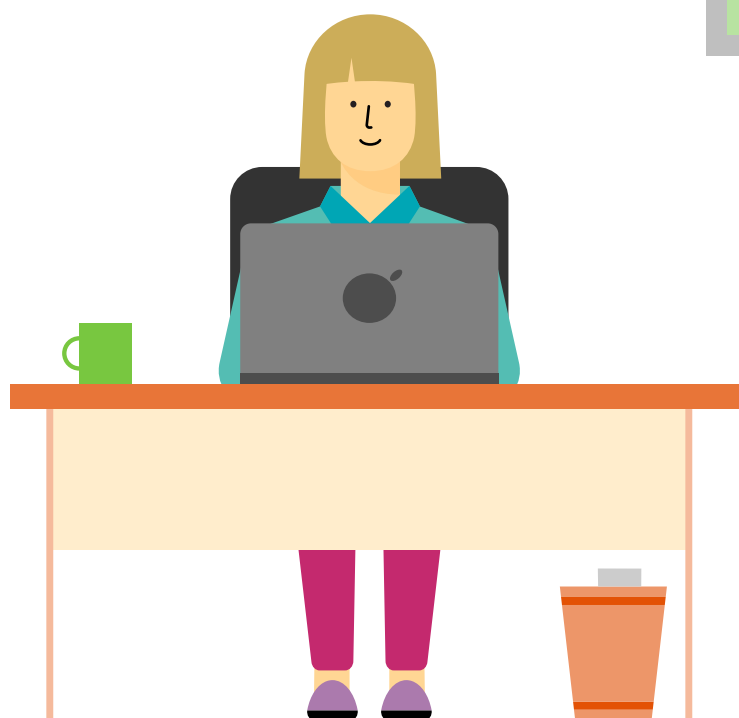
Setting up a bank account

When you self-manage, we can't process your claims until you give us your bank account details.

Where possible, this should be a separate account just for NDIS funding that is not used for everyday living expenses. Having a separate bank account for your NDIS funding makes it easier for you to see what money comes in and what payments go out.

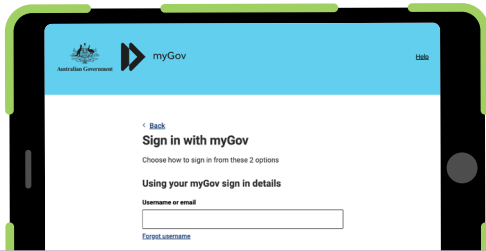
NDIS funding will be paid into an account managed by the person responsible for self-managing the supports. This will be you as a participant, your plan nominee, or a child representative for a participant under 18 years of age.

You can give us your bank account details at any time. You can talk to your My NDIS Contact, call us, or record it in the portal.



Making a claim

Using the myplace portal or my NDIS app is the easiest and quickest way to make a claim. When you can't use the portal or the app, you can use the [payment request form](#) on the NDIS website. Once you submit a claim, it will usually take 1-2 business days to be paid into your bank account. Only you, a child representative, or your plan nominee can make claims in the portal or app.



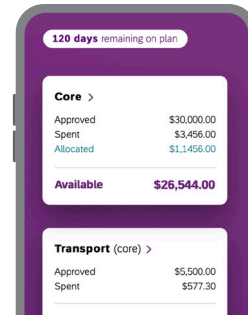
Using the myplace portal

To make a claim:

1. Log in to the [portal](#) from the NDIS website or through [myGov](#).
2. Select the My Payment Request option.
3. On the My Payment Requests screen, select Add My Payment Request.
4. Fill out the details of your request including date of supports, support category and amount.
5. For more than one payment request, select the Add Another button.
6. Preview, declare and submit your payment request.

The payment request needs to match the invoice or receipt from your provider, or if you are directly engaging staff, your payroll records. It should be made against the support category that matches your support purchase.

To learn more about using the [myplace portal](#), visit the NDIS website.



Using the my NDIS mobile app

To make a claim from your self-managed budget in the my NDIS mobile app:

1. Fill out the details of your claim including date of supports, support category and amount.
2. Enter the payee's ABN. If the payee does not have an ABN, you can select the checkbox 'Payee does not have the ABN' to continue.

You can upload an invoice or receipt before submitting the claim in the app. You can save favourite claims to make claiming for regular supports even faster.

To learn more about using the [app](#), visit the NDIS website.

You can download the my NDIS app from the Google Play Store and Apple App Store for free.





What happens if you make a mistake?

We know self-managers try to do the right thing but sometimes make mistakes. We want to help participants, nominees and child representatives learn how to do the right thing before it becomes an issue. If you make a mistake, we'll work with you to fix it.

To fix a mistake in your claim, you can cancel a paid claim in the portal or app, call us, or submit a payment enquiry in the portal. Our payment team will work with you to resolve the issue.

How to avoid common claiming mistakes

It is important to make sure your claims are complete and accurate, and you have the right invoices and records to match your requests.

To make sure your claims are right, you should check:

- you enter the correct start and end date for the support you are claiming
- the payment amount you enter in the portal or app matches the amount on the invoice or receipt. Sometimes there might be an extra digit added by mistake or a decimal point in the wrong spot
- you're making the claim against the right support category and that this category is self-managed
- you have enough funds in your plan for the claim.

Self-manager Gill is using the tools and resources available to help her get the most out of her NDIS plan.



“I would encourage all participants to give self-managing a go. I think you will be very surprised how easy it is. If you do internet banking you will be able to self-manage.”

Gill

Gill is a grandmother of 7 who lives with Spinal Muscular Atrophy. She has been an NDIS participant for almost 7 years and enjoys the greater control that comes with self-management.

Gill learnt about the tools available for self-management, including the self-management guide, and found a process that works for her.

‘I downloaded myGov onto my laptop and then linked NDIS services to it. I find it quite easy to submit my invoices on the portal. Once I’m on the NDIS portal, I press on My Payment Request and then Add My Payment Request.’

‘I put the date that I received services, then the support category it comes under and the amount that’s owed. You can write a brief description of the service, such as the support worker’s name or ‘OT’.

‘All these claims are kept in the portal forever, so if I need to go back and check on something I go to My Payment Request and press on View My Payment Request.

‘I do all my invoicing on a Monday morning and each invoice takes a couple of minutes to submit. All payments are deposited into

my bank account on Tuesday and my staff are paid the same day.

‘I keep all my invoices and put them into a document folder on my computer, and I print them out and store them in my filing cabinet.’

Gill appreciates the flexibility that comes with self-management.

‘I love self-managing my own funds, I hire independent support workers and physiotherapists so I can get more service hours with my funding. I can also plan my days better and hire support workers when I need them.’

By arranging her own services Gill pays less than the NDIS price limits, which means she can get more services out of her funding.

‘I advertise on social media when looking for new staff. There are numerous Facebook groups where support workers are looking for work. I have used Disability Gateway which can help participants to find occupational therapists, physiotherapists, and support workers for all supports that are needed.

‘If I’m not sure about buying or renting something, I ring the NDIA contact centre and confirm with them.’

What records do you need to keep?

You must keep records of how you spend your NDIS funds. Records can show that you have spent your funding in line with the supports in your plan and made the correct claims.

Records can include payroll summaries, service agreements, payslips, invoices, receipts or bank statements. You should keep records for a minimum of 5 years.

It's important to keep your records organised. You can keep hard copy or digital versions of your records. You can upload your records to the portal or app as you make claims, or you can choose to manage your own records.

Payment records should include:

- the provider's name
- the provider's ABN or evidence they are exempt from quoting an ABN
- the support start and end date
- a short description of the support provided
- the amount of support provided (hours or quantity)
- the support price (per hour or unit)
- the total amount paid.

If you employ your own staff, you must keep up to date payroll records with the dates and hours your staff work and the amount you pay them. You'll also need to keep records of tax, superannuation and insurance payments.

Payment reviews

Our compliance and payment teams sometimes undertake reviews to make sure self-managed funds are being spent and managed properly. We'll contact you by letter or email if we're going to review your payments.

By keeping records and spending your funding in line with the supports in your plan, you'll be able to respond appropriately to any review.

We can ask you at any time to provide evidence of a payment that matches any of your claims.

We might contact you as part of a random review, or because we've noticed unusual claims against your plan. We might review only one payment, or review all your claims against your current or previous plans.

When this happens, we'll talk to you about:

- why we are reviewing your payments – if we think you've made a mistake, if we think there is something wrong with a payment from your plan, or if you are part of a random review.
- what information we would like to get from you and how you can provide it to us – this might be by emailing us, or uploading documents to the portal or app, such as copies of your receipts, invoices, bank statements or payroll records.
- how the supports you have purchased fit with your plan – this might be by providing evidence you have or through conversations about how you use the supports you have purchased.

You will be given time to collect your records and submit them to us. The letter or email will include a due date and the contact details of the person completing the review. You'll be able to contact them throughout the review.

If there is no valid evidence or records for claims, we may cancel outstanding payments or raise a debt that you'll need to pay back. We may also limit your ability to self-manage your plan in the future.

Notes




Notes






[ndis.gov.au](https://www.ndis.gov.au)

National Disability Insurance Agency

 Telephone 1800 800 110

 Webchat [ndis.gov.au](https://www.ndis.gov.au)

Follow us on our social channels



For people who need help with English

 TIS: 131 450

For people who are deaf or hard of hearing

 TTY: 1800 555 677

 Voice relay: 1800 555 727

 National Relay Service: relayservice.gov.au

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