

NDIS self-management: what do I need to know?

Self-managing your child or young person's NDIS plan allows you to have more flexibility and freedom in how you choose and use your supports. However, there are also responsibilities and obligations to keep in mind. Here are some things to keep in mind when making the decision to self-manage.

What is covered in this fact sheet

- [Increasing your choice and control](#)
- [Self-management has responsibilities](#)
- [Paying for services and supports](#)
- [Using the NDIS Participant Portal](#)
- [Service providers: registered or unregistered?](#)
- [The NDIS Price Guide is just a guide](#)
- [Finding support to self-manage](#)
- [Making the change to self-management](#)

Increasing your choice and control

Self-management can give you more flexibility, choice and control over the support and services you purchase with your NDIS funds.

A lot of people think that NDIS self-management is a lot more work. In fact, it can be less work! When self-managing, you deal directly with service providers which means you can make changes faster, negotiate directly and take advantage of sales and specials. You also do not have to follow up on whether invoices have been paid.

Every NDIS participant has their own specific needs and circumstances, and it is important to think about these when deciding how you want your plan managed. You also need to consider your administrative capacity and ability to find and engage supports.

Self-management has responsibilities

When you are self-managing NDIS funding, your responsibilities include:

- Using and managing your funding – which includes finding service providers, making payment requests through the NDIS participant portal to get the funding, and then paying service providers on time.
- Record keeping – having evidence of how you have spent the funds of your NDIS plan and that your purchases were linked to participant goals. You will need to keep invoices, receipts, bank statements, records of staff and shifts worked, or any other evidence of NDIS funds spent.
- Auditing – you may be audited by the NDIS. If this happens, you will need to provide your records to prove how the NDIS plan funding was spent.
- Having clear arrangements with service providers – as a self-manager, you do not need to have a service agreement with service providers. You also do not need to share your NDIS plan with a service provider, even if they ask. You do need to have an agreement with any service provider you use around what the service is for, the frequency of the service, cancellation policies and progress reports for plan reviews.

Paying for services and supports

You might worry about paying for services out of your own pocket and waiting for a reimbursement from the NDIS. This is not the case for all payments, though you will need to discuss payment terms with any service providers you use.

You should be able to claim funds from the NDIS and then pay your service provider, as most will allow a few days to pay bills. If you don't have this option, you may want to speak to your provider and negotiate a payment option. Alternatively, you can pay for services using a credit card and pay it off after reimbursement.

Using the NDIS Participant Portal

The NDIS Participant Portal is where you request payment from the NDIA into your nominated account. To use the NDIS Participant Portal, you will need to link your NDIS account to your MyGov account. You will receive an activation code to access the portal for the first time.

The process of requesting a payment is very straightforward. Some participants and their families say that if you can do online banking or payments, you can self-manage an NDIS plan. In the payment request, you will only see the category of funds from which you are paying (e.g. Capacity Building Daily Activities). You don't need to specify line items in payment requests.

Service providers: registered or unregistered?

When self-managing NDIS funds, you have the option to use NDIS registered providers, unregistered providers, contractors or to directly employ your own support workers. You can have a mix of these options in your support team. It may seem scary to employ staff directly due to the paperwork and legal requirements, but it is reasonable to do. You can also ask for support and training to get you ready to employ your own staff, including training or to pay for relevant software.

The NDIS Quality and Safeguards Commission investigates complaints around registered NDIS service providers. However, the [NDIS Code of Conduct](#) still applies to both registered and unregistered service providers and their employees.

The NDIS Price Guide is just a guide

When you are agency- or plan-managed, you are limited to the prices in the NDIS price guide and cannot pay more than is listed. When you self-manage, you have flexibility to pay above (or below) the NDIS price guide rates if you choose to. This can have benefits, as you can negotiate hourly rates with service providers or offer better rates to retain support workers who provide great support to your child or young person. You can also use this option to pay for allied health professionals, who may have the right expertise and supports to fit your child or young person's goals.

Finding support to self-manage

You don't have to do everything on your own if you choose to self-manage your child or young person's NDIS plan. You can request training for self-management and include self-management as a plan goal. If you have funding available, you can use it to pay for supports to help you self-manage.

Informal supports can also be valuable. Connecting with other families and learning from their experience can help you prepare to self-manage. However, peer support does not replace expert advice, and you may also want to seek out formal supports to help you in your journey.

Making the change to self-management

You can discuss self-management with your ECEI, LAC or Planner at your planning or review meeting. If you already have an NDIS plan and want to begin self-managing, you can also request a light touch review. A light touch review is an unscheduled review to change the way your plan is managed.

If you are already self-managed and want to change back to plan- or agency-managed, you can also do this. You may need to explain why you are making this change.

Disclaimer: CYDA's In Control Our Way resources have been created to support families of children and young people with disability to self-manage their NDIS plans. Information provided is intended as a general guide and may not contain the most recent information and updates. CYDA is not responsible for decisions made by the NDIA or its partners in the community. For the most current information on the NDIS, refer to the NDIS website. These fact sheets are current as of September 2020.

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