

NDIS Self-Management Frequently Asked Questions (FAQs)

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Your child or young person's NDIS plan

How can I change from agency-managed or plan-managed to self-management?

You can ask to change how your plan is managed at your plan review meeting. If you want to change how your plan is managed in the middle of your plan, you can contact your ECEI, LAC or Planner and request a light touch review.

I have received my child or young person's new plan and will be requesting a review. Can I still use the plan's funds in the meantime?

You can use the funding in your plan even if you have requested a review. A review of a reviewable decision (internal review) can be a lengthy process and you can use the funding in the plan during this time.

My child or young person's NDIS plan includes support coordination. We are self-managing, does the support coordinator need to be NDIS registered?

Support coordinators do not need to be NDIS registered providers, unlike plan managers.

What does it mean to have flexibility in Core funding?

Funding you receive for Core supports can be used flexibly in all the categories in this budget: consumables, assistance with daily living, assistance with social and community participation and transport. This means you can use funding from another Core category if you run out of funding in one area, as long as your purchases are related to plan goals and fit the rule of reasonable and necessary.

Making payments

I am self-managing my child or young person's NDIS plan. How can I avoid paying for services and supports out of pocket?

When you self-manage, you can pay service providers and then receive reimbursements from the NDIS. However, this method does leave you out of pocket for a short time.

You can use a credit card with points for your NDIS purchases and pay off the card debt once you receive your NDIS reimbursement. You should be able to avoid paying interest if you pay off the balance immediately after being reimbursed. However, you cannot

claim credit card surcharges to the NDIS. If a service provider charges extra fees for using a credit card, you will have to pay these yourself. You should check with your regular service providers about credit card fees.

You also have the option to discuss payment terms with your service providers and negotiate a payment schedule that works for you.

Can I pay therapists with core funding?

Therapists cannot be paid using core funding. Therapists are paid from the Capacity Building support budget, while Core funds are used to pay for support workers. Core funding categories are only flexible within the overall Core budget and not with Capacity Building or Capital funding.

Can I claim recreation activities for my child or young person under my NDIS plan?

If the recreation activities are offered as mainstream classes, the NDIS will not fund them. However, the NDIS may fund music therapy, dance therapy or arts therapy if they are delivered by a qualified professional or are disability specific groups. These activities need to be linked with the participant's goals and need to be recommended and assessed to be funded.

You can claim recreational therapist activities under Capacity Building: Daily Activities.

Do I need to pay for transport, food/drinks or activity tickets for support workers who accompany my child or young person?

Support workers are responsible for paying for their own food and drinks when out with your child or young person. If they attend an event or activity to support your child or young person, you will need to pay for transport and entry fees. You can apply for a Companion Card for your child or young person to cover the cost of public transportation and entry to some places for support workers.

Can I buy items relating to my plan goals from overseas?

You can buy items from overseas as long as the supplier has an ABN and you have an invoice or receipt. The item should still be considered good value for money compared to other options and meet the NDIS criteria of reasonable and necessary.

Can I buy items relating to my plan goals secondhand?

You can buy secondhand items and claim reimbursement as long as you have a receipt or invoice for the purchase. If you don't have a receipt or invoice, you can take a screenshot of the item listing and record the seller's details, any correspondence with the seller, and the purchase transaction.

Service agreements

Do I need to make a service agreement with service providers if I am self-managing?

You do not need to have or sign a service agreement with a service provider if you are self-managing. You will still need to have clear arrangements in place around the purpose of the service, the conditions and terms of work, and any cancellation fees.

In some cases, you may need to ask a service provider for reports to prove how your child or young person is progressing with their NDIS goals and to justify continuing the service. You should discuss this with your service provider to make sure it is included when necessary.

Can I negotiate a service agreement?

You can negotiate service agreements with your service providers. It is important to be specific and clear about the service and how it is provided. You may want to negotiate a higher rate of pay, which will benefit the NDIS participant and still represent value for money.

Many of the service providers you deal with will have their own service agreement template, but you can always ask for clarification or to add or change it when necessary. Make sure you understand what the fees will cover – many providers will be making phone calls, travelling, discussing with other professionals or reporting in addition to spending time with your child or young person. It is important to know how they bill for these parts of their work. You can ask for an Easy Read version of your service agreement.

If you are not happy with the terms and conditions of a service agreement, you can choose not to use that service provider. As a self-manager, you have more freedom to choose who you want to deliver services.

If you have concerns about a service agreement, you should contact the service provider to discuss it directly. If you feel the service agreement is unreasonable, you can contact the [NDIS Quality and Safeguards Commission](#) to make a complaint.

Claiming payments and using the NDIS portal

What if I make a mistake claiming from the wrong category in the NDIS portal during a payment request?

If you make a mistake and notice quickly, you may be able to cancel the request in the NDIS portal. To do this, click on "pending payment" and cancel the request. You can then submit a new payment request with the correct category.

If you are unable to cancel the payment request, you should call the NDIA and discuss your next steps.

How long does it take to receive a reimbursement after submitting a payment request?

When you submit a payment request in the NDIS portal, you should receive the payment in your nominated account within 24 to 48 hours. However, this can vary depending on when you submit your request. Submitting a payment on a Friday or in the evening can mean funds will take longer to be transferred.

What help is available?

I want to self-manage, but I need some help to get there. What training can I get?

You can use NDIS funds for training in different areas of self-management, including setting up and maintaining a record system, employing staff, and general self-management skills.

For more detailed information on training options for self-management, see CYDA's [Parent and carer training and supports funded under the NDIS](#) fact sheet.

Can I hire a bookkeeper to help with self-management?

You can request funding for an accountant or bookkeeper in your NDIS plan. These services fall under Capacity Building funds under the Improved Life Choices category. You should think about how you want this support: do you want someone to help you with this on a regular basis and to do your payment processes for you, or do you just need support to set up a system that you will use?

If you already have an NDIS plan, you can use Core funds to pay a bookkeeper or accountant. Generally, a bookkeeper will be more affordable than engaging an accountant.

Your information

Do I need to share my child or young person's NDIS plan with my support workers?

You do not need to give your NDIS plan details or reference number to your support staff, even if they ask for it. You will need to provide your name for the invoice and details of the service you are requesting. You may need to share your child or young person's plan goals to be able to track progress.

Can I get information from NDIS about my plan under Freedom of Information?

You can request information from the NDIA by emailing FOI@ndis.gov.au. It should take around four to five weeks to receive your requested information.

For more information, visit the [NDIS Freedom of Information page](#).

Your rights under the NDIS

Does the NDIS Code of Conduct still apply to my support workers if I am self-managed?

Yes. Anyone providing supports under the NDIS must abide by the [NDIS Code of Conduct](#). It does not matter how the participant's plan is managed or if the provider is registered.

Under the Code of Conduct, anyone who works with your child or young person **must**:

- Respect your child or young person's rights and choices
- Respect your child or young person's privacy
- Deliver safe and good quality services and supports
- Be honest and act with integrity
- Respond to concerns quickly and take action
- Take all reasonable steps to prevent and respond to abuse, neglect, violence and exploitation
- Take all reasonable steps to prevent and respond to sexual misconduct.

How do I complain about a service provider?

To make a complaint about a NDIS registered service provider, you can contact the [NDIS Quality and Safeguards Commission](#).

The Commission is not able to take complaints about unregistered providers, and you will have to raise complaints directly with the provider. However, the NDIS Code of Conduct still applies even if a provider is unregistered.

The NDIS Quality and Safeguards Commission can also receive complaints about NDIS community partners, including ECEI and LACs.

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.

View the full set of In Control Our Way resources at: cyda.org.au/



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