



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.

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.



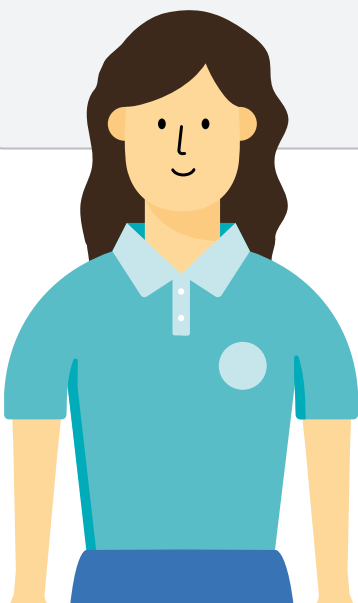
Control

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.



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.’

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.

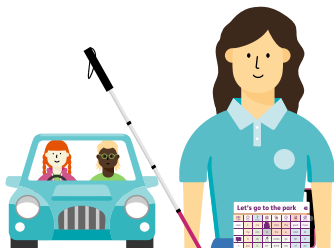
Your NDIS plan is divided into two parts: a statement of your goals and aspirations, and then the statement of your supports.

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](#).

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



“Take the time find to 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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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?

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.

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.’

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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