

## **GUIDE TO SELF MANAGEMENT**

### **3 ways you can manage your plan**

**Self Management** – The <sup>1</sup>NDIA provides you with funding so you can buy supports that will best help you meet your plan goals. Your support provider may or may not be registered with the NDIS. You can negotiate the price you pay for a support, provided the cost can be met within your plan funding for the duration of your plan. You do not need a service booking for you self-managed support as you pay your providers directly.

**Plan Management:** the NDIA pays your plan manager, who will pay your providers for you. Your plan manager must be registered with the NDIS. A registered provider meets the NDIS quality and safety standards. If you decide to use a provider that is not registered, ensure they have the correct qualifications, training and safety checks. Your other support providers may or may not be registered with NDIS. Your plan manager cannot pay more than the NDIA set price limit for specific supports.

**NDIA-managed funding:** the NDIA pays your providers on your behalf. The NDIA can only pay providers that are registered with the NDIS and cannot pay more than the NDIA set price limits.

You will be asked how you would like to manage your NDIS funding during your planning meeting. Talk to your LAC or the NDIA beforehand to understand your options.

### **What supports can I get to help me self-manage?**

If you want to self manage but are not sure if you're ready you can ask your LAC or NDIA planner for additional support to develop the skills you need. Any savings you create by self managing your NDIS funding can also be used to buy support to help you to manage your funding effectively. Some examples of supports that can help you self manage include:

- Bookkeeping and accounting services
- Employment services
- Software applications
- Support coordination and plan management assistance
- Peer support organisations.

### **Registered provider supports.**

These supports must be provided by a provider that is registered with the NDIS:

- Specialist Disability Accommodation

- Specialist behaviour support services that provide behaviour support assessment or develop a behaviour support plan.
- Any support where the provider may need to use a restricted practice.

You have a choice about what supports you buy to achieve your goals.

Once you understand your NDIS plan and support budget you can choose the supports you are going to buy. As a self manager you can be creative when working out how you can best meet your needs and plan goals using your funding. The following guidance has been created to help you decide what you can buy with your NDIS funding.

### Can I buy it with my NDIS funding?

Will the support help you to reach the goals in your NDIS plan?	The Support buy must be linked to the support budgets and goals in your current NDIS plan and related to your disability
Is the support reasonably priced and good value?	The support should give you good value-for-money compared to other options. Remember you can choose to pay less and get more support or pay more for a higher quality support that meets your needs.
Can you afford the support within your support budget?	Your NDIS funding needs to last for the length of your plan. 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.
Will the support help you to connect with your community and improve the relationships you have with family and friends?	The support you buy should help you to participate in activities with friends and other members of your community, or help you find or keep a job
Is the support something that should be funded by the NDIS and not other government services?	In your NDIS plan the funded supports will not include support that is provided by other government services. For example, dental, health or hospital services, education, housing and public transport are all provided by other government services.
Is the support safe?	The support you buy must be legal. It should not cause harm or put yourself or other people at risk.

You cannot use your NDIS funding to pay a family member to provide you with support. This is important for you and your family so you can maintain good relationships.

## **Who can I buy my supports from?**

A provider is a person, business or organisation that delivers your support.

Once you have decided what to buy, it is time to find out more about the providers in your area. It is good to research providers, check reviews and get advice from family, friends and peers. You can meet with different providers before you decide who will provide your support. Your Early Childhood Early Intervention (ECEI) Coordinator, LAC or support Coordinator can also help you. To find NDIS registered providers you can search the provider finder on the myplace portal.

Remember that it is easy to change providers if you are not happy with the support you are getting, or think you may be able to get better value using a different provider.

As a self manager there are different ways you buy your supports. You can:

1. Buy your supports from a business or organisation.
2. Use self employed contractors
3. Directly employ staff

1. Businesses and organisations – Normally businesses and organisations will arrange your support and take responsibility for the support workers on your behalf. When you arrange supports with a NDIS registered provider it is important to let them know that they will need to provide you with an invoice for payment.
2. Self employed contractors – A self employed contractor is a person who has an ABN and is generally responsible for managing their own insurance, tax and superannuation. Self employed contractors may be NDIS registered or not.

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

- Relevant safety checks
- An ABN
- Appropriate insurance
- The right qualifications and skills

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

3. Directly employing Staff

You choose, recruit 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 where relevant, any relevant safety checks
- Meet the costs of recruiting staff, paying their wages, superannuation and any insurances, from the rate of support calculated in your plan budget.
- 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.

### **Thinking innovatively to achieve your goals**

One of the benefits to self managing is being able to be creative when it comes to meeting your needs and finding support that help you work towards your goals. You may find some supports you've chosen don't come in the form of a support person or provider and that's fine. They still need to be related to the supports included in your plan and your plan goals.

### **How much do I pay for supports?**

Just like you have the flexibility to use any provider that can best help you to reach your goals, as a self manager you can negotiate the price of your support with your provider.

It is good to compare prices of similar supports across different providers to make sure you are getting the best value.

Consider the following when deciding on how much to pay for a support:

- Value for money: Is the cost of the support reasonable when you think about the benefit you will get?
- Quality: Is the quality of the support high and will it help you achieve your goals?
- Quantity: How much support will you need for the length of your plan?
- Budget: How much funding do you have available in your NDIS plan and can you afford the amount of support you need within your budget?

### **Making a service agreement**

You are encouraged to have a service agreement in place with each of your providers, which clearly outlines what 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. You will be responsible for paying your providers on time and meeting your agreed responsibilities with them.

### **How do I pay for my supports?**

Once you've arranged your supports and providers you will be responsible for paying for them using your NDIS funding:

There are two options to pay for your supports with your NDIS funding:

1. Make a payment request and then pay your provider: Once you receive an account, invoice or timesheet for your provider, make a payment request. This can be done online using the myplace portal. Money from your NDIS plan budget will be paid into your nominated bank account within 24 to 48 hours. You can then pay your provider.
2. Pay your provider and then make a payment request: Once you receive your support, pay your provider using your own money and get a receipt. Make a Payment Request to have the money from your NDIS plan budget paid into your nominated bank accounts. You will be reimbursed within 24 to 48 hours.

### **Setting up a bank account**

If you are self managing your NDIS funding, you should set up a separate bank account. It will make it easier for you to see what money is coming in and what payments are going out. NDIS funding will only be paid into an account that is managed by the person responsible for self managing the supports. This will be you as a participant, a NDIS plan nominee or a child representative for a participant under 18 years of age.

### **How do I make a Payment Request?**

Using the online myplace portal is the easiest and quickest way to make a Payment Request. To make a payment request log in to your myplace portal and select the payment request option. You can then enter the:

- Start and end date for the support
- Payment amount
- Support category (the self managed support budget in your NDIS plan that you want to draw funds from)

The Payment request needs to match the invoice or receipt from your provider, or if you are directly employing staff, your payroll records. It should be made against the support category that matches the type of support you are making a request for.

Once you have submitted a Payment request it will take within 24 to 48 hours to be paid in to your bank account. The NDIS website has information about how to use the myplace portal and the Payment request form.

### **What do I need to know about my plan review?**

### **Change in your circumstances and support needs**

It is important to tell your LAC or NDIS planner about any event or change in your circumstances that may affect your plan. This includes if you are planning on travelling overseas for longer than six weeks. If there are any changes in your support needs or circumstances, you will need to complete a change of circumstances form. It is best if your NDIS plan is set up from the beginning so you can manage your NDIS funding in a way that

best meets your needs. If you need, you can ask for a review to change the way your funding is managed.

### **End of plan review.**

You will be contacted before your plan ends to discuss a review of your plan. This gives you and the NDIS the opportunity to:

- Check that the supports you are purchasing are helping you to achieve your goals
- Set new goals where past goals have been achieved
- Explain how you have changed any supports that have not worked well
- Provide information about the supports that have worked
- Discuss how you can increase your independence and continue to build your capacity to self manage.