













Should I self-manage? Six questions to ask yourself:

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|  Do you pay your bills on time? |  Do you understand which skills you do and don't have when it comes to filling out forms or handling money, and do you know who to ask for help? |
|  Can you review a bank statement and see if there is anything that you have not authorised? |  If you want to hire your own staff directly, do you know what the laws are about hiring your own staff, or where to go to find this information? |
|  Can you keep and organise receipts, bank statements and other paperwork? | |
|  Can you be firm with someone if you don't like what they are doing to support you? | |

If you answered yes to some of these questions, and feel confident you could develop skills in the other areas, then you are ready to consider self-managing either part, or all of your NDIS Budget. The NDIA has to also approve you for self-management and opportunities exist for capacity building in these areas if you or the NDIA think you're not quite ready.

The self-management process – the steps to self-management:

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|  Set up a bank account – you are advised to have a separate bank account for NDIS Funding with the account being opened in the participant's name. |  Employment responsibilities – you should pay the correct wages, superannuation and other relevant insurances to your supports. |
|  Developing and maintaining a list of providers – you should keep a list of all providers that deliver the supports you need. The list should include contact details, budget reference numbers and any other relevant NDIA required information. |  Claiming through the NDIS Participant Portal – you are responsible to make Payment Requests and claim for the services you have received against each support item outlined in your Plan. |
|  Employ your own supports – you should ensure that you have a signed Agreement and the people and/or services providing supports have the right accreditation. |  Maintaining financial records – you will need to keep all invoices and receipts organised and up to date. You will need to keep these records for 5 years. |

Self-management responsibilities:

- Choosing and arranging your own supports which may include support workers, either employed through providers or sourced independently.
- Ensuring that invoices for your supports are paid correctly and on time.
- Keeping records and receipts for supports used.
- Reporting to the NDIA on which supports have been accessed and the relevant costs associated.

If you are considering self-managing your plan, here are some things you can do to get ready now:

1. Practice keeping notes on how much money you spend and the item you purchased.
2. Enroll in a course that will teach you skills about keeping track of money and record keeping.
3. Learn from other people, go to a workshop, read about record keeping, source instructional videos, access ILC capacity building supports or ask your Planner to include capacity building in your Plan with a goal of self-management.

References: