

NDIS in WA Planning Self-Management Checklist



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



Do you pay your bills on time?



Can you review a bank statement and see if there is anything that you have not authorized?



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?



Do you understand which skills you do and don't have when it comes filling out forms or handling money, and do you know who to ask for help?



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 for this information?

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 in WA budget. The NDIS in WA has to also approve you for self-management and opportunities exist for capacity building in these areas if you or the Local Coordinator thinks you're not quite ready.

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



Your Local Coordinator will outline the tasks and responsibilities involved with managing your supports as set out in the Department of Communities (Disability Services) Self-Management Checklist



Your Local Coordinator will need to sign the approve self-management, and you and your Local Coordinator will need to sign the acceptance of Grant Funds Agreement.



Set up a bank account – you need to have a separate 'fee-free' bank account for NDIS in WA funding with the account being opened in the participant's name.



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.



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, signed documentation by the person or organisation showing that support has been provided and paid for.



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.
- Completing tax returns.
- Keeping records and receipts for supports used.
- Reporting to your Local Coordinator on which supports have been accessed and the relevant costs associated.

Self-management responsibilities:

1. Practice keeping notes on how much money you spend and the item you purchased.
2. Enrol 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 Local Coordinator to include capacity building in your Plan with a goal of self-management.