



Down Syndrome  
Western Australia

# Managing your plan in the NDIS

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Down Syndrome WA

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# Managing your plan in the NDIS

When you have your planning meeting, the NDIS planner will ask how you want to manage your plan. This means managing your supports and paying for them.

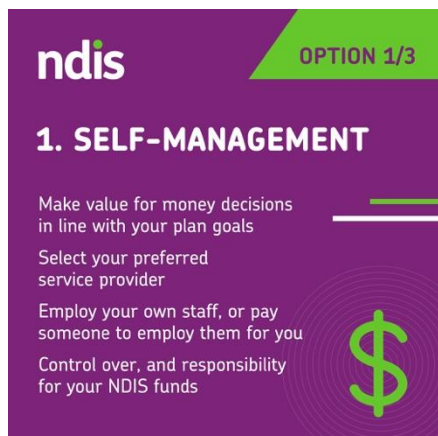
So you should do some thinking beforehand so that you know which management option you want. But, if you choose one type of management, then find it isn't the best for you, you can ask to change at any time. You can also choose more than one management option. For example, you could self-manage part of your plan and have the rest agency managed.

There are three ways of managing your NDIS plan:

1. Self-management
2. Plan management
3. Agency managed



# Self-management



## What is self-management?

Self-management is when a person with disability manages the supports and funding in their own NDIS plan. It can also be a person acting on their behalf, such as a parent.

## Why choose self-management?

Managing your own funded supports and services gives you more control over how the funding is spent to meet the goals in your plan. Self-managing gives you more flexibility when it comes to planning what supports and services you want and deciding how you want them delivered. You can decide what supports you need to meet your goals.

Self-managing means you don't have to fit into what is already set up by registered service providers. You can choose from services and supports that are or aren't registered, so you have greater choice. This can be disability service providers, such as therapy providers, or other providers, for example a cleaning company. This can include any type of support, as long as it is necessary because of your disability and is in your NDIS Plan.

If you use a provider that isn't NDIS registered, they can set their own fees, and you may be able to negotiate a rate you are both happy with. This could be a lower fee, but you might also want to pay a higher amount if you feel it is worth it.

While unregistered providers don't have to stick to the NDIS Price Guide (registered providers must stay within the price guidelines), you could look at it to see what might be a reasonable amount to pay.

## **A note about Service Agreements**

Registered providers will usually expect you to have a Service Agreement. It isn't compulsory, but you should think about having a Service Agreement with any provider, as it includes important information and written reassurance of getting a good quality service. You might decide to have a Service Agreement with some providers and not others. If you are self-managing, it's up to you.

A Service Agreement sets out details of the service you will receive, what the costs will be, any charges for cancellations, travel costs and any other charges. It should include important policies such as Privacy and Complaints.

It should also include how much notice to give if you decide to change to another provider. A Service Agreement gives you some protection, so make sure you are happy with the Service Agreement and don't sign it if you aren't. You have the right to negotiate changes, though some providers are more flexible than others. If they won't include what you want, you should think about whether this is the right provider for you.

## **Your responsibilities if you self-manage**

Self-managing can be a very positive experience and help build your confidence and abilities to have greater control of your life. However, there are rules and responsibilities that you have to follow if you want to self-manage.

Self-management means you are responsible for organising your supports and making sure the supports you receive are paid for. This includes:

- choosing and organising your supports, including your own support workers
- making sure that invoices for your supports are paid on time
- keeping appropriate records and receipts for supports provided, claimed and paid
- reporting to the NDIA on the amount used and funds spent on the self-managed items of your NDIS plan.

It is important, that you, or someone who can help you, can do these things properly. You could be audited, so you need to have good records. You can use some of your Core funding to pay someone to help you do this, but you can't pay yourself or a family member. (Or, see Plan Management section).

You can submit claims to the NDIA and the money will be deposited into your nominated NDIS bank account. You will need to set up a separate bank account for your NDIS funds. If you have more than one NDIS participant in your family, each person should have their own account.

## **How to pay and claim from your NDIS funds**

The NDIS has developed a process that helps you to manage your finances quickly and efficiently.

You claim directly through your private section of the NDIS Participant Portal, called MyPlace.

Claims are processed quickly (generally within 48 hours depending on who you bank with).

You can also choose to pay a service provider up front and claim the expense back through the portal.

NDIS then reimburses you for these expenses, with the money deposited into your bank account.

There are forms you can download from NDIS to record payments made for supports if you can't claim online using the MyPlace portal.

## **Directly employing your own staff**

Self-managing your plan allows you to directly employ your own staff, or pay someone else to employ them on your behalf.

Direct employment of staff gives you control over the people who work with you, the hours they work and the tasks that they perform. Direct employment is only an option if you self-manage your NDIS funding.

However, you don't have to directly employ all of the staff who deliver your NDIS funded supports. You can use this option on its own or you can also use self-employed contractors or other service providers (including service providers registered with the NDIA).

If you are directly employing staff, you have the same legal and regulatory obligations as an employer, such as:

- Police and/or Working With Children checks
- Following Occupational Health & Safety regulations
- Understanding workplace relations and employee's rights
- Making sure your staff get any training they need to support you
- Making sure your staff are paid
- Taking out Worker's Compensation and any other insurances you may need
- Paying Superannuation
- Organising tax payments

## **Getting ready to self-manage**

If you would like to self-manage but you aren't sure if you are ready, talk with the NDIS planner about including some options in your plan to help you develop self-management skills.

You could also talk to other people who have experience self-managing NDIS funding, to see what it's like. There are lots of people in the NDIS and Me Facebook group who self-manage NDIS plans.

### **Working out if you are ready to self-manage**

Here are some questions to help you work out if you are ready to self-manage:

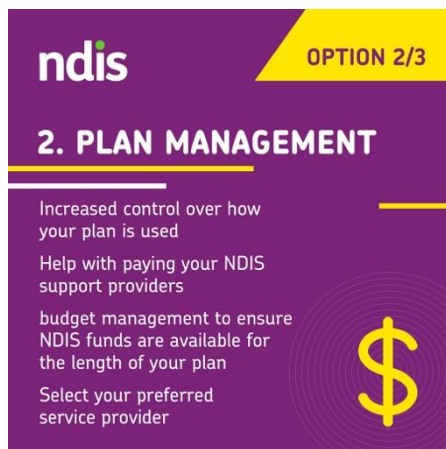
- Do you pay your bills on time?
- Can you review a bank statement and see if there is anything that you have not authorised?
- Can you keep and organise receipts, bank statements and other paperwork?
- Can you be firm with someone if you don't like what they are doing to support you?
- Do you understand which skills you do and don't have when it comes to 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?

If you answered yes to all of these questions, then you are ready to consider self-managing part, or all, of your NDIS Budget.

<https://www.ndis.gov.au/participant/self-managing-budgets.html>



# Plan management



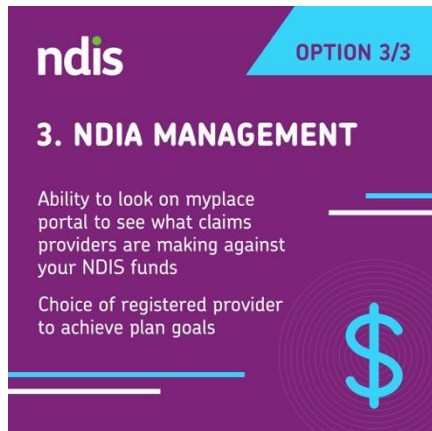
Plan management offers the benefits of self-management, but also gives you help to do the bookkeeping. So it's a good option if you can't manage or just don't want to do the paperwork and record keeping.

The NDIS will add extra funds to the plan to pay for a Plan Manager to pay the bills for your supports. Plan Manager fees don't come out of your other funding, so you don't miss out on supports if you go with this option. Plan Managers must be registered with NDIS.

You can send bills for payment to the Plan Manager, or your service providers can send bills to your Plan Manager. The Plan Manager needs to keep you informed about what is happening. You should be able to go online and look at your account with them to make sure they are paying bills correctly and on time.

The NDIS has a list of registered Plan Managers. It's a good idea to talk to a few to decide which will be best for you.

# Agency management



Agency management means the NDIS pays your service providers directly after you have received the supports. The service providers invoice the NDIS through a separate provider portal and get paid without you being involved. However, you can check in on the MyPlace portal to see what providers have claimed and what funding is left. You don't need to do any bookkeeping or have a separate bank account, but you can still ask for regular invoices so you can check that charges are correct.

With agency management, you can only use NDIS registered providers. This generally means less control and flexibility over how your funds are used to support you. Registered providers can't charge more than in the NDIS Price Guide, and most will charge the maximum fee allowed.

## **A combination of management options**

Lots of people choose to self-manage some parts of their plan but have the rest agency managed. Having a mix gives you choice and control where you want it, but means you don't have the responsibility for managing the other funded supports and services.

For example, you might decide to go with agency managed for your therapy services, if you are happy with the provider and want to save your time and energy doing the management. But if you want to use a therapy provider that is not registered, then you'll need to self-manage those funds.

Some people like to self-manage when it comes to their support workers, while others prefer a provider to organise all that is involved.

Many people choose to self-manage the part of their plan that covers aids and equipment and consumables, so they can get these items more quickly and sometimes at a lower cost.

When you are getting ready for your plan, think about which parts of your plan you might like to self-manage, to get more choice and control, and which parts you are happy to have agency managed. It's up to you, and remember, you can change to a different management option.

## **Resources**

Here are some useful links to help you understand more about the different management options:

### ***NDIS***

Understanding your plan and supports. This has a link to download a useful overview document called Managing your NDIS Funding Package

<https://www.ndis.gov.au/participants/understanding-your-plan-and-supports.html>

This page has lots of information about finding providers, what to consider, Service Agreements and more. The NDIS is also currently developing an online

Provider Finder which will make it easier to find providers to suit your needs in your area.

<https://www.ndis.gov.au/finding-and-engaging-providers.html>

### ***The Growing Space***

This highly recommended website is full of useful, practical information and advice based on personal and professional experience. We suggest you look at these links about managing your plan and funding, and subscribe to their regular blogs and Facebook page.

<http://www.thegrowingspace.com.au/uncategorized/ndis-self-plan-and-agency-management-compared-side-by-side/>

<http://www.thegrowingspace.com.au/tips/ndis-nuts-and-bolts-3-how-to-manage-money-in-your-ndis-plan/>

### ***WaiS***

Engaging Your Own Supports

This resource is for people who live in **Western Australia** who have decided to privately hire their own support staff. You can download the resource including in Plain Language and Easy Read formats.

<http://waindividualisedservices.org.au/home/national-disability-insurance-scheme/self-management/engaging-your-own-supports/>



Down Syndrome WA is a peer support organization. Our staff have their own experiences of using services and supports, doing planning and managing services and supports with their own families. We also have up to date information, a regular NDIS & Me eNews, local support groups and online support groups, where you can discuss NDIS planning with other people.

We can help you with getting ready for your NDIS plan, and advise on putting your plan into action.

Contact us at:

Down Syndrome WA

Ph: (08) 9368 4002

Email: [admin@downsyndromewa.org.au](mailto:admin@downsyndromewa.org.au)

Down Syndrome WA: [www.dsawa.asn.au](http://www.dsawa.asn.au)

Our NDIS page, where you can download a range of pre-planning resources and find other information <http://www.dsawa.asn.au/information/ndis/>

NDIS & Me Facebook Group for people with Down syndrome and their families: <https://www.facebook.com/groups/NDISandMe/>