

# Self-managing your child's NDIS Plan



Self-managing gives you more control over the supports you use to achieve your child's NDIS goals.

Self-managing isn't better or worse than other Plan management options, but it does give you more choice and control. It's something to consider if you think it will make life easier, or help you get the supports your child and family need.

## Set yourself up for success

You can self-manage all or part of your child's NDIS Plan. Choose what feels right for you based on your skills and the time you have available.

You can also talk to your NDIS Planner, Early Childhood Early Intervention (ECEI) Co-ordinator or Local Area Co-ordinator (LAC) about learning the skills to be able self-manage in the future.

## Is it the right time?

Choosing the best time to start self-managing is really important. Think carefully about whether it's the right time and consider:

- Do you have time to pay invoices and keep payment records?
- Are you confident with internet banking and transactions?
- Are you familiar with the myGov and myplace portals?
- Do you understand your child's NDIS Plan?

If you find these things easy to do, then it could be time to start self-managing.

## Tips for self-managing

- Open a separate bank account in your child's name and look for an account that has low or no fees
- Set up a system for keeping invoices and payment records. You could use a spreadsheet or coloured folders to file paperwork. All invoices must be kept for five to seven years
- Make a regular time each week or month for filing and keeping payment records in order. It's important to keep records organised so that you can show the NDIA how you spent the funds
- Use a separate email account for all NDIS communication and invoices so that NDIS messages don't get lost amongst personal or work emails
- When you self-manage, you are responsible for making payment requests and claims for the services you received against each support category in your child's Plan

- Write the claim number on each invoice after you've logged it
- Set a budget and track your expenses. Don't allocate every cent - allow a buffer of about 5-10% of each category amount. This can be used for unforeseen events or expenses. If an unforeseen expense becomes ongoing, tell the NDIS about your change in circumstances
- Allocate some money for the end of the Plan in case you overspend. You can use these funds to stock up on consumables, low cost Assistive Technology, or for trips out and about in the final month of the Plan
- Go slow and don't set up all your services to begin at once. Start with what you're already using that's working well and go from there
- Expect to make some mistakes but remember that you'll learn more skills as you go, and get faster as it becomes more familiar
- You will need to get approval from the NDIA to self-manage and there are opportunities for increasing your skills if you or the NDIA think you're not quite ready

## **Useful links**

[NDIS guides to self management](#)

[How to use the myplace portal](#)

[Self Manager Hub](#)