



Self-managing funds for supports in my plan

In your discussion with your planner you will have talked about whether you would like to self-manage funding of the supports in your plan.

Self-managing funding of supports in your plan means that you will be responsible for:

- sourcing and arranging your supports;
- making payments to your chosen providers, including ensuring that providers receive their payment on time;
- managing your plan expenditure, including submitting My Plan Purchases forms to the National Disability Insurance Agency (NDIA); and
- keeping records of all your plan purchases and providing these to NDIA

Please note: the information in this fact sheet also applies to nominees and persons representing a participant who is a child.

Arranging my supports

If you are self-managing funding of the supports in your plan you can choose to receive your supports from registered providers, as well as providers who are not registered with the National Disability Insurance Scheme (NDIS). For more information on this see the [Choosing a Provider fact sheet](#). The NDIS website has a list of registered providers in your local area.

You are encouraged to sign an agreement with your provider to ensure that you both have a clear understanding of how your supports will be delivered, and how you and your provider will manage the delivery of your supports. A model agreement is provided on the [Making an Agreement with your Provider fact sheet](#).

If you are self-managing the supports in your plan you can choose to directly employ your own support worker. There are legal requirements that you need to be aware of before employing your own workers. For more information on this please refer to the [Employing a Support Worker fact sheet](#). You may also wish to access some of the free resources developed under the [Practical Design Fund](#) for people who choose to manage the funding for their supports.

Paying for supports

For supports in your plan that are identified as being 'flexible' supports, the NDIS will provide you with an initial amount paid into your nominated NDIS bank account to enable you to pay for supports. This must be a separate bank account used only for payments from the NDIS and spent only on supports listed in your plan.

Your advance payment is a one-off payment that is based on an estimate of one month's cost of the flexible support items in your plan. The payment is made to ensure that you do not have any out-of-pocket expenses to claim back from the NDIS.

You will need to submit a 'My Plan Purchases' form to generate your next NDIS payment. On this form you will provide details of the support items bought and the amount spent. Your next payment amount

will then be paid into your nominated NDIS bank account. You can submit this form as regularly as you wish. The 'My Plan Purchases' form can be downloaded from the Participant Portal.

You will not need to attach receipts for expenditure on flexible supports items in your plan. For items that are identified as 'fixed supports', you should provide a quote or invoice with the 'My Plan Purchases' form to receive payment. Please refer to the record keeping section below for more information on the filing of receipts for payments.

For supports identified as being 'fixed supports' you will need to get a quote or invoice for the item before your NDIS funds can be paid to you. You will need to attach the quote or invoice to the 'My Plan Purchases' form.

Payments from the NDIS for approved reasonable and necessary supports are not considered income by the Australia Taxation Office and therefore are exempt from tax. For more information visit the [Australian Tax Office website](#). These payments are also not treated as income if you are receiving Centrelink payments or for the purposes of Child Support Benefit.

Any interest earned on the NDIS funds in your nominated bank account is treated as income and must be reported to the Australia Tax Office as part of your yearly income. In addition, any bank charges that are incurred on your bank account are your responsibility as the account holder.

Before paying a provider you will need to ensure that the invoice you receive accurately charges you for the supports you received. If you have any concerns about the invoice please raise them directly with your provider.

If you are unable to resolve the issue with your provider you may wish to give feedback to NDIS through the NDIS feedback page.

Managing your plan expenditure

The 'My Plan Purchases Form' will help you keep track of plan expenditure. You will also receive a 'My Plan Statement' that will outline the payments made for supports in your plan. Please check that expenditure on the 'My Plan Statement' is consistent with your own records. If you have any concerns about your 'My Plan Statement' you should contact your local NDIS office on 1800 800 110. For more information see the 'My Plan Statement' fact sheet.

It is your responsibility to ensure that you spend your funds only on the supports identified in the plan. If funds have not been spent in accordance with your plan you may incur a debt to the NDIS.

If you have any queries about what is or is not included in the plan, please talk to your Planner. You must notify the NDIA at any stage if there are any changes in your circumstances that may affect the supports in your plan.

Record keeping

You need to keep receipts of expenditure of plan funds to produce to NDIA if required. These receipts need to be kept for five years. This includes any invoices or receipts for cash payments.

For payments that do not have receipts, you will need to keep appropriate records. For example, for supports that include mileage you will need to keep an Australian Taxation Office approved logbook, recording all the trips that you have claimed for.

The NDIS may conduct audits on your payments and you will need to be able to provide supporting records of expenditure of your funds.