

# Getting set up to self-manage my NDIS plan

This checklist shows the steps to follow when you are getting set up to self-manage. If you need help with any of these steps, you can ask your my NDIS contact. You could also ask friends or family, or talk to other participants and families who self-manage.

## Setting up a bank account

I have set up a way for NDIS payments to come into a bank account that I can access and manage. I have:

Table 1: Checklist: Setting up a bank account

Steps	Completed
a bank account for my NDIS payments	<input type="checkbox"/>
internet banking	<input type="checkbox"/>
a card for making payments (optional)	<input type="checkbox"/>
given the bank number to my NDIS contact	<input type="checkbox"/>

## Accessing your NDIS plan and funding

I can see and access the funding in my plan. I have:

Table 2: Checklist: Accessing your NDIS plan and funding

Steps	Completed
linked NDIS to myGov on my computer	<input type="checkbox"/>
installed the my NDIS app on my phone or tablet	<input type="checkbox"/>

## Arranging supports

I understand my NDIS plan funding. I have worked out how I can use my funding to get the NDIS supports I need, in line with what is included in my NDIS plan. I know:

Table 3: Checklist: Arranging supports

Steps	Completed
my NDIS plan funding	<input type="checkbox"/>
what NDIS supports I can afford in line with my plan, and any funding periods or funding component amounts in my plan	<input type="checkbox"/>
how to check my NDIS funding and make sure it will last until the end of my plan	<input type="checkbox"/>

## Choosing providers

I am going to find the best NDIS supports to meet my needs. I can:

Table 4: Checklist: Choosing providers

Steps	Completed
find out what NDIS supports are available near me	<input type="checkbox"/>
choose an NDIS support that best meets my needs	<input type="checkbox"/>
check if the provider has a good reputation	<input type="checkbox"/>
make sure the provider has the right training, insurance and safety checks	<input type="checkbox"/>
ask providers about their fees and charges	<input type="checkbox"/>
make sure I understand and am happy with a service agreement before I sign it	<input type="checkbox"/>

## Claiming funds from your NDIS plan

I know how to access my NDIS plan funding to pay for a support. I can use the my NDIS portal or my NDIS app to:

Table 5: Checklist: Claiming funds from your NDIS plan

Steps	Completed
submit a claim	<input type="checkbox"/>
provide any supporting information or evidence, like the provider's Australian Business Number (ABN), or invoices and receipts	<input type="checkbox"/>
cancel a claim if I make a mistake	<input type="checkbox"/>

## Paying for supports

I need to claim my NDIS funding and pay my providers on time. I have:

Table 6: Checklist: Paying for supports

Steps	Completed
a system set up so that I can keep up with payments to my providers	<input type="checkbox"/>

## Keeping records

NDIS staff may contact me to review claims I have made. I have set up a system for keeping records to show how I have spent my NDIS funding. I have:

Table 7: Checklist: Keeping records

Steps	Completed
an email address for NDIS information	<input type="checkbox"/>
a place to save the NDIS records that are sent to me by email	<input type="checkbox"/>
a way to scan and save NDIS records that are given to me on paper	<input type="checkbox"/>
a place to keep the paper records that are given to me. (If records are kept electronically you don't need to keep paper copies)	<input type="checkbox"/>

# National Disability Insurance Agency

[ndis.gov.au](https://www.ndis.gov.au)

Telephone 1800 800 110

Webchat [ndis.gov.au](https://www.ndis.gov.au)

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## **For people who need help with English**

**TIS:** 131 450

## **For people who are deaf or hard of hearing**

**TTY:** 1800 555 677

**Voice relay:** 1800 555 727

**National Relay Service:** [relayservice.gov.au](https://relayservice.gov.au)