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# Step 1: Setting up your bank account

When self-managing your NDIS funding, it's a good idea to set up a separate bank account. It'll make it easier for you to see what money is coming in and what payments are going out.

NDIS funding will only be paid into an account held by the person responsible for self-managing the supports, paying providers and keeping records.

This will be you as a participant, your nominee or a child representative for a participant under 18 years of age.

## Provide us with your bank account details

You can add or update your bank details by:

- using the participant portals
- calling us on 1800 800 110
- visiting your local NDIS office in person.

# Step 2: Choose who to work with

You can choose which providers to buy your NDIS supports from. You can choose registered NDIS providers or unregistered providers.

As a self-manager, you have the freedom to:

- choose from both registered and unregistered providers
- negotiate how much NDIS support will cost
- manage your working relationship with your providers.

You may also choose to engage or employ your own support staff.

Learn more about engaging your own staff in the guide to directly engaging your own staff.

Download the guide to directly engaging your own staff:

- Directly engaging your own staff (PDF 313KB)
- Directly engaging your own staff (DOCX 311KB)

# Step 3: Pay for your NDIS supports

There are 2 ways to pay for your NDIS supports when you self-manage, after you've received the supports from a provider:

- Option 1: We pay you first, then you pay the provider.
- Option 2: Pay them out of your own pocket, then we pay you back.

Learn more at how to pay for your NDIS supports and working out how much to pay your providers .

# Step 4: Keep records of your spending

## Keep track of your claims

You must keep records of how you spend your NDIS funds. Records can show that you've spent your funding in line with the supports in your plan and made the correct claims.

You should keep records such as receipts, invoices, payroll records, dates and any notes you have about a particular support you received for 5 years.

We review claims before and after we pay them.

You should submit a claim as soon as possible after receiving an NDIS support.

We may hold a claim for review if you submit it more than 90 days after the support is delivered. The review may take up to 28 days.

We may ask you to provide evidence of the NDIS support you've received to make sure it matches your claim or payment request.

We check that funds are being spent on NDIS supports and in line with your plan.

You can choose to keep track of payments by keeping hard copies or digital versions of your records, but your records need to have:

- the provider’s name
- the provider’s ABN or reason they are exempt from providing an ABN
- the start and end dates of the support
- the NDIS support category
- a short description of the support provided
- the amount of support provided (hours or quantity)
- the price of the support (per hour or unit)
- the total amount paid
- a receipt or tax invoice.

Learn more about keeping good records .

## Step 5: Know how much funding you have left

Your NDIS funding needs to last for the length of your plan. The NDIS supports you buy must fit into your total funding amount.

We’ll call this a 'total budget amount' in your plan.

Work out your budget early so you know what you can afford. You can also track your funding by checking the funding available every time you make a claim.

Check your funding by:

- signing in to the participant portal
- using the my NDIS app.

> **Tip: Use our supports calculator.**
>
> Our budgeting calculator can help you work out how many hours of support you can have.

## Videos

Learn more about self-managing in the videos below. You can find more videos about self-managing your funding on our YouTube channel .

### Finding good supports while self-managing

Learn how to find supports that are a good fit for you in this video.

Transcript for 'Finding good supports while self-managing'

## Making claims and paying providers

Learn how to pay for NDIS supports as a self-manager in this video.

Transcript for 'Making claims and paying providers'

## Resources

Download the guide to self-management:

- Guide to self-management (PDF 1.68MB)
- Guide to self-management (DOCX 214.57KB)

Download the guide to self-management Easy Read:

- Guide to self-management - Easy Read (PDF 7.18MB)
- Guide to self-management - Easy Read (DOCX 60.37KB)

## Related information

### What is self-managed funding

### How to find and choose a provider

### How to pay for your NDIS supports

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