

## On this page:

[Guide to self-management](#)

[Self-management policy](#)

[Responsibilities](#)

[Supports purchasing guide](#)

[Self management manual claim form](#)

[NDIS worker screening check](#)

[Other self-management resources](#)

[How to start self-managing your plan](#)

[Transcript for 'Self-Managing Your Plan'](#)

Self-management is when you manage your NDIS funding. It gives you the flexibility and choice to decide what supports you buy to pursue your plan goals.

It lets you think creatively about how you can use your funds to best meet your needs.

If you are interested in self-managing all or part of your NDIS plan, speak with your Local Area Coordinator (LAC) or NDIA planner. You could also talk to someone you know who is self-managing about their experience or connect with a self-management peer support group.

We are committed to improving the experience for self-managers.

We have developed the NDIS Guide to Self-management for people who are self-managing, or interested in self-managing their NDIS funding. The guide explains the benefits of self-management, roles and responsibilities and how to self-manage effectively.

## Guide to self-management

- [Guide to self-management \(PDF 936KB\)](#)
- [Guide to self-management \(DOCX 313KB\)](#)
- [Guide to self-management - Easy Read - Part 1 \(PDF 1.1MB\)](#)
- [Guide to self-management - Easy Read - Part 2 \(PDF 1.4MB\)](#)
- [Guide to self-management - Easy Read - Part 1 \(DOCX 42KB\)](#)
- [Guide to self-management - Easy Read - Part 2 \(DOCX 38KB\)](#)
- [Directly engaging your own staff \(DOCX 167KB\)](#)

If you would like a printed copy, you can speak to [your local office](#) or [contact us](#) and request a copy of the NDIS guide to self-management.

## Self-management policy

We have developed a [self-management policy](#). The self-management policy explains how self-management works in the NDIS.

We developed this policy in consultation with NDIS participants, Independent Advisory Council members and representatives from the disability sector.

We also collected [information and research](#) from a variety of publications from all over the world and undertook a series of focus groups with NDIS participants.

Our staff and partners use [Our Guideline - Creating your plan](#) to put this policy into action.

## The benefits of self-managing

Self-managing your NDIS funding gives you control, independence and flexibility in arranging and paying for your supports.

If you self-manage your NDIS funding you will have:

- **Choice** in deciding what supports you purchase in line with what is included in your plan, who provides these supports and how they are delivered.
- **Flexibility** to use any provider that will best help you to pursue your plan goals.
- **Capacity** to employ or contract staff directly, or have someone employ staff on your behalf.
- **Ability** to negotiate the costs of your supports so you get the best value-for-money and to use savings to buy more or better quality supports.
- **Control** over and responsibility for your NDIS funding so you can manage your own budget for the duration of your plan.

## Responsibilities

If you are thinking about self-managing you need to understand your responsibilities as a self-manager. Your responsibilities include:

- **Purchasing supports** that link to the goals in your NDIS plan.
- **Making clear agreements** with your providers about the supports you will receive including how they will be provided and paid for.
- **Managing your funding** so the costs of the support give you value-for-money and can be met from within your budget.

- **Claiming and paying for supports** by making payment requests and paying for your supports on time.
- **Keeping invoices and receipts** to show you have paid for your supports using your NDIS funding.
- **Meeting your obligations as an employer** if you choose to employ staff directly.
- **Showing how you've used your self-managed funding** towards pursuing your goals at your plan reassessment.
- **Advising the NDIA** of any significant changes in your circumstances that may result in you being unable to meet your responsibilities as a self-manager.
- **Participating in any payment reviews** where you will need to provide invoices, receipts or other evidence to show you have spent your funds in-line with your NDIS plan.

For more information about your responsibilities as an employer read [Directly engaging your own staff \(DOCX 167KB\)](#).

## Supports purchasing guide

You have choice about what supports you buy with your NDIS funding, to help you pursue your goals.

Supports must:

- be linked to the support budget and goals in your current NDIS plan and related to your disability
- give you good value-for-money compared to other supports
- last the length of your plan
- be legal.

Supports must not:

- replace supports that would usually be provided by family or friends
- include supports provided by other government agencies (for example, dental, health or hospital services)
- include any gap fees for Medicare
- cause harm, or put you or others at risk.

If you are unsure about what you can buy with your NDIS funding, you can check with your Local Area Coordinator (LAC) or NDIA planner. You can also refer to the Purchasing Guide in the Guide to self-management (available at the beginning of this page).

## Self management manual claim form

- 
- [Manual self-management claim form \(DOCX 86KB\)](#)
  - [Manual self-management claim form \(PDF 372KB\)](#)

## NDIS worker screening check

Self-managed participants can choose to ask workers to get an NDIS worker screening clearance. This clears a person to work in certain roles to reduce the risk of harm to people with disability.

Self-managed participants can ask to access a database to check the clearance status of an NDIS worker.

To find out more, visit the [NDIS Quality and Safeguards Commission](#) website.

## Other self-management resources

We have compiled a list of external resources such as webinars, podcasts and peer support networks. [These resources](#) can help you to learn more about self-management.

## How to start self-managing your plan

If you would like to make a request to self-manage your plan, you can:

- speak to your local area coordinator or early childhood partner
- [contact us via phone, email or web chat](#).

---

This page current as of  
15 September 2023