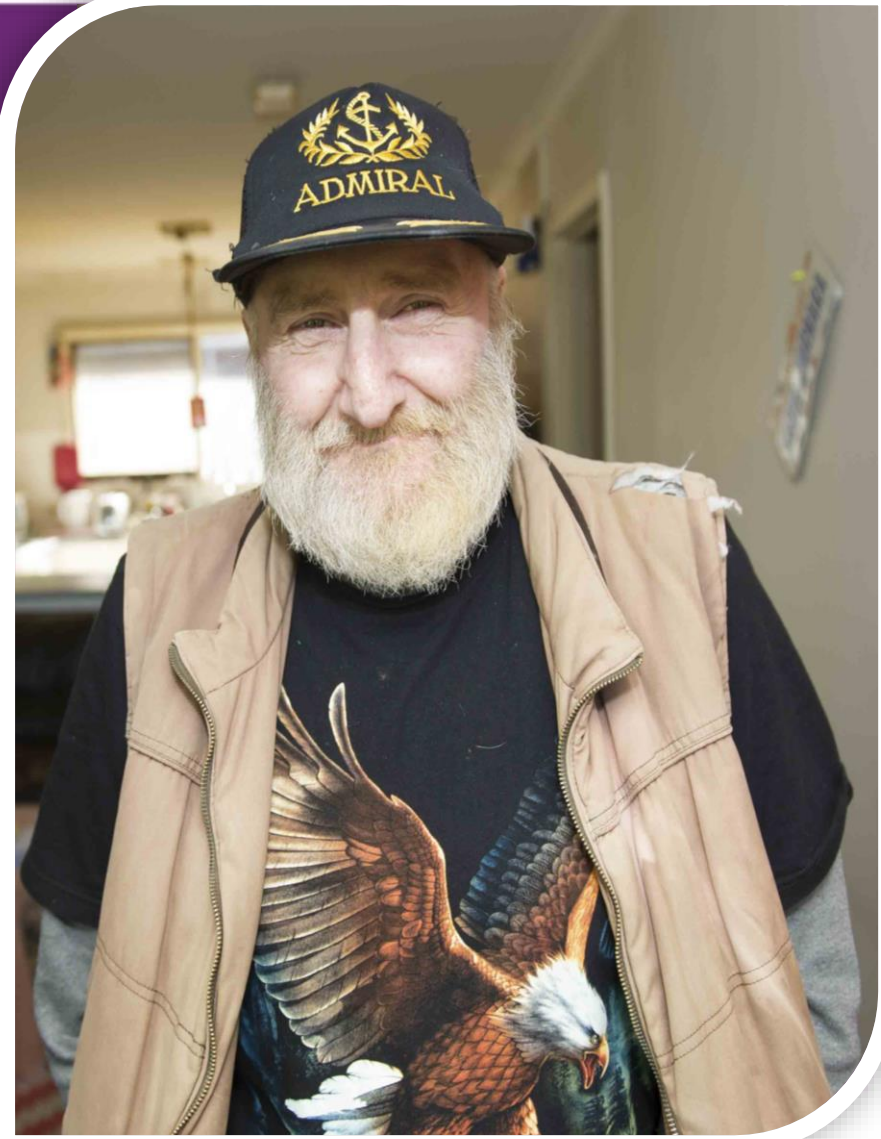


Self managing your NDIS plan Workshop

Community and Mainstream Engagement
Western Australia



Delivered by the
National Disability
Insurance Agency



NDIS Information Sessions:

This workshop is aimed at participants, their families and carer's currently self-managing or about to have their planning meeting and are considering it.

Preceding sessions:

- Understanding the NDIS
- Preparing for your Planning conversation
- Using your NDIS Plan

Audience specific presentations:

- Self-managing your NDIS plan
- Psychosocial Disability and the NDIS
- GP's, Allied Health and the NDIS



Overview

- NDIS process
- What is Self-management?
- Why Self-Manage?
- Type of Support Budgets
- Providing Bank Details
- Payment Requests
- Recordkeeping
- Engaging your Support worker
- Participant Portal
- Contact Details



Who can help you start your plan?

Your LAC, ECEI Coordinator or Support Coordinator will help you start your NDIS plan.

They can help you:

- Understand your plan and what supports and services you can pay for with your NDIS funding
- Connect with community and other government services
- Find providers
- Put service agreements and service bookings in place with your providers
- If you have questions, concerns or something in your life changes

Our Partners helping in WA



APM are the LAC Partners in:

North Metro, Central South Metro, South Metro,
South West, Great Southern & Inner Wheatbelt



Mission Australia are LAC Partners in:

North East Metro, Central North Metro
& South East Metro

Wanslea are ECEI Partners in:

Central South Metro, South Metro, South
East Metro, South West, Great Southern
Inner Wheatbelt, North East Metro,
Central North Metro and South East
Metro



Overall Process



Management
options

Bank Account
Details Form

Plan
Approval

Plan
Implementation

Payment
Request



Management Options



Why Self-Manage?

- **CHOICE** of supports and how they are delivered
- **FLEXIBILITY** to use any Provider
- **CAPACITY** to employ or contract staff directly
- **ABILITY** to negotiate costs of supports
- **CONTROL** over NDIS budget to manage the plan



Are you ready to self-manage?



- Do you pay your bills on time?
- Can you read a bank statement and see if there is anything that you have not authorised?
- Can you keep and organise receipts, bank statements and other paperwork?
- Can you be firm with someone if you don't like what they are doing to support you?
- Do you understand which skills you do and don't have when it comes to filling out forms or handling money, and do you know who to ask for help?
- If you want to hire your own staff directly, do you know what the laws are about hiring your own staff?

If you answered yes to all of these questions, then you are ready to consider self-managing part, or all, of your NDIS Budget.



Self-management Responsibilities



- Managing your Plan Budget
- Sourcing and arranging your Supports (NDIS registered or not)
- Establishing Service Agreements; requesting detailed invoices & receipts
- Submitting Payment Requests to NDIA and making payments to Providers on time
- Keeping receipts and records, providing these to NDIA if requested



Managing NDIS funding

An NDIS Plan has three support budgets:

- **Core**
- **Capital**
- **Capacity Building**

You receive reasonable and necessary funding under the relevant budget, depending on your goals and support needs.



‘Core’ supports budget

The ‘Core’ supports budget has four support categories:

- **Daily activities**
- **Consumables**
- **Assistance with Social & Community participation**
- **Transport**

Funding is flexible across each category (some exceptions apply to Transport).

Capital supports budget



The Capital supports budget has two support categories:

- **Assistive Technology**
- **Home Modifications**



Funding is NOT flexible within the Capital supports budget. Any equipment requests need to be prescribed by a Therapist.



Capacity Building (CB) funding



Capacity Building (CB) funding is allocated across 9 support categories.

Each category is aligned to your plan goals.

You can choose how to  spend funds on any approved individual support within a category.

You cannot move funding from one category to another.



Your Plan



SUPPORT PURPOSE	SUPPORT CATEGORY (Plan Budgets)	APPEARANCE ON THE PORTAL
CORE	1. Assistance with Daily Life	Daily Activities
	2. Transport	Transport
	3. Consumables	Consumables
	4. Assistance with Social & Community Participation	Social Community and Civic Participation
CAPITAL	5. Assistive Technology	Assistive Technology
	6. Home Modifications	Home modifications
CAPACITY BUILDING	7. Coordination of Supports	Support Coordination
	8. Improved Living Arrangements	CB Home Living
	9. Increased Social and Community Participation	CB Social Community and Civic Participation
	10. Finding and Keeping a Job	CB Employment
	11. Improved Relationships	CB Relationships
	12. Improved Health and Wellbeing	CB Health Wellbeing
	13. Improved Learning	CB Lifelong Learning
	14. Improved Life Choices	CB Choice Control
	15. Improved Daily Living Skills	CB Daily Activities

Overall flexibility limitations



Funding flexibility is limited in the following ways:

- Claims can only be paid for supports provided **from the** date the plan is approved.
- Funds are not flexible between management options once set up.
- If using a mix of management options, once self-managed funding is used up, participants cannot use Agency managed funds to pay for those services.
- You cannot use other funds to claim categories or supports that are not funded (approved) in your plan

Terms used on your plan and what they mean

Stated supports (not flexible)

‘Stated supports’ are not flexible - funding cannot be used for anything else.

Quote required

Supports considered during planning but additional information such as quotes or require specialist or therapist reports will be required before funding can be made available in your plan.

In-kind supports (pre-paid)

Supports listed as ‘in-kind’, means the service has already been paid for by your state, territory or the Australian government.

What can you spend your funding on?

Consider the following when deciding what to buy with your NDIS funding:

- Will the support or service achieve your NDIS plan goals?
- Is the support or service reasonably priced?
- Can you afford the support or service in your NDIS budget?
- Will the support or service help you to improve how you connect with your local community and the relationships you have?
- Is the support or service something that should be funded by other government services?
- Will the support or service help you to participate in activities to help you to find a job?
- Is it value for money?
- Is it safe?

Gap Payments/Double Dipping



- Supports may be paid by either private health insurance, Medicare or NDIS; ***it cannot be a combination.***
- Supports received & paid by NDIS are not claimable against other Commonwealth Programs such as Medicare.
- Use of health insurance to pay a funded support would also be classed as double dipping.
- If there is funding in a participant's plan for therapy, the participant cannot claim this service from their health insurance or Medicare and pay the gap from NDIS.
- If concerned that funding in the plan will not be enough, speak to your Planner, LAC or ECEI coordinator.

Bank Details

- We recommend having a separate bank account for NDIA payments.
- You can open an account in your child's name in most banks.
- Bank Account Details will need to be entered under the payee nominee
- NDIS payments do not need to be declared as income or to the ATO.

Bank Account Details	
Name of Bank or Financial Institution	
BSB Number (6 digits)	
Account number	
Account held in the name(s) of <small>(must be the participant, plan nominee or child representative)</small>	

Methods to Update Bank Details



**Through myPlace
Participant Portal**

Instant

**By Phone to your
Planner or LAC**

**Up to 3
Days**

**Submitting a
Bank Details
Form**

**Up to 3
Days**

SESSION BREAK



Accessing the Participant Portal - Myplace



First, you will need to have a myGov account

- https://www.youtube.com/watch?v=JWxhoE9QQ_8

myGov is an easy way to access all your government services on the internet



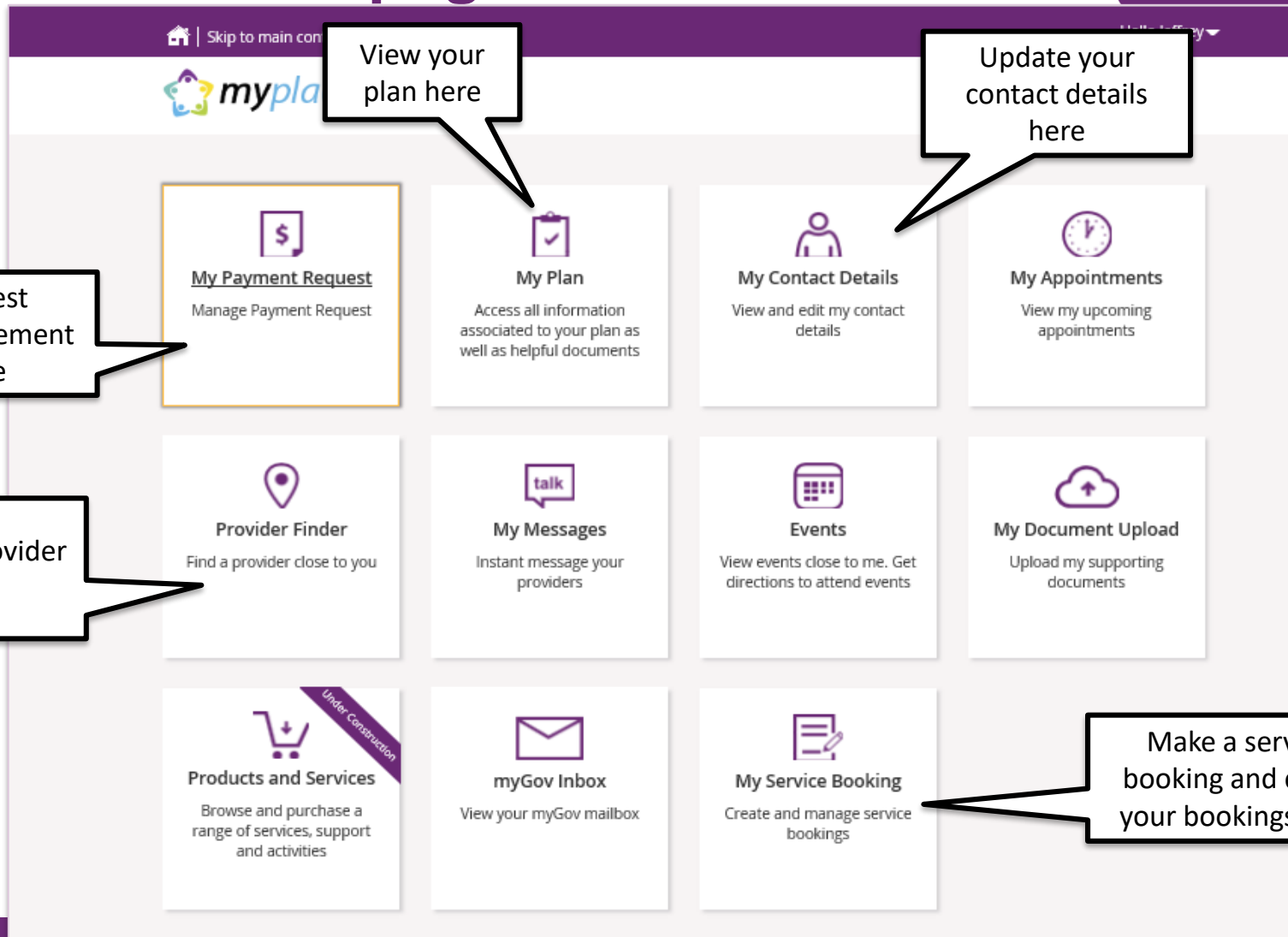
You can call the myGov Helpdesk on [13 23 07](tel:132307), select **Option 1**.

Available:

Monday – Friday 7:00am - 10:00pm

Saturday & Sunday 10:00am - 5:00pm, in local timezones

myPlace homepage



View your
plan here

Update your
contact details
here

Request
reimbursement
here

Find a provider
here

Make a service
booking and check
your bookings here

Payment Requests

- Submitted via the portal. If any problems, can be submitted using a manual My Plan Purchases Claim Form.
- Submit as often as you like (recommend at least once a month).
- Separate claims for different providers - easier to reconcile
- Multiple claims for the same support category can be submitted together – dates each support was delivered need to be listed.
- Cannot make claims for future dates. Exceptions (eg: Worker's Comp) need to be assessed by NDIA on a case by case basis.
- Claims cannot be submitted for supports provided across plan periods (one plan ending and another starting). Claims need to be split accordingly to each period.
- A wrong payment request can be cancelled and resubmitted. This creates a recovery (-ve amount) that offsets against future claims.

Submitting a Payment Request



Click **My Payment Request** then **Add My payment Request**



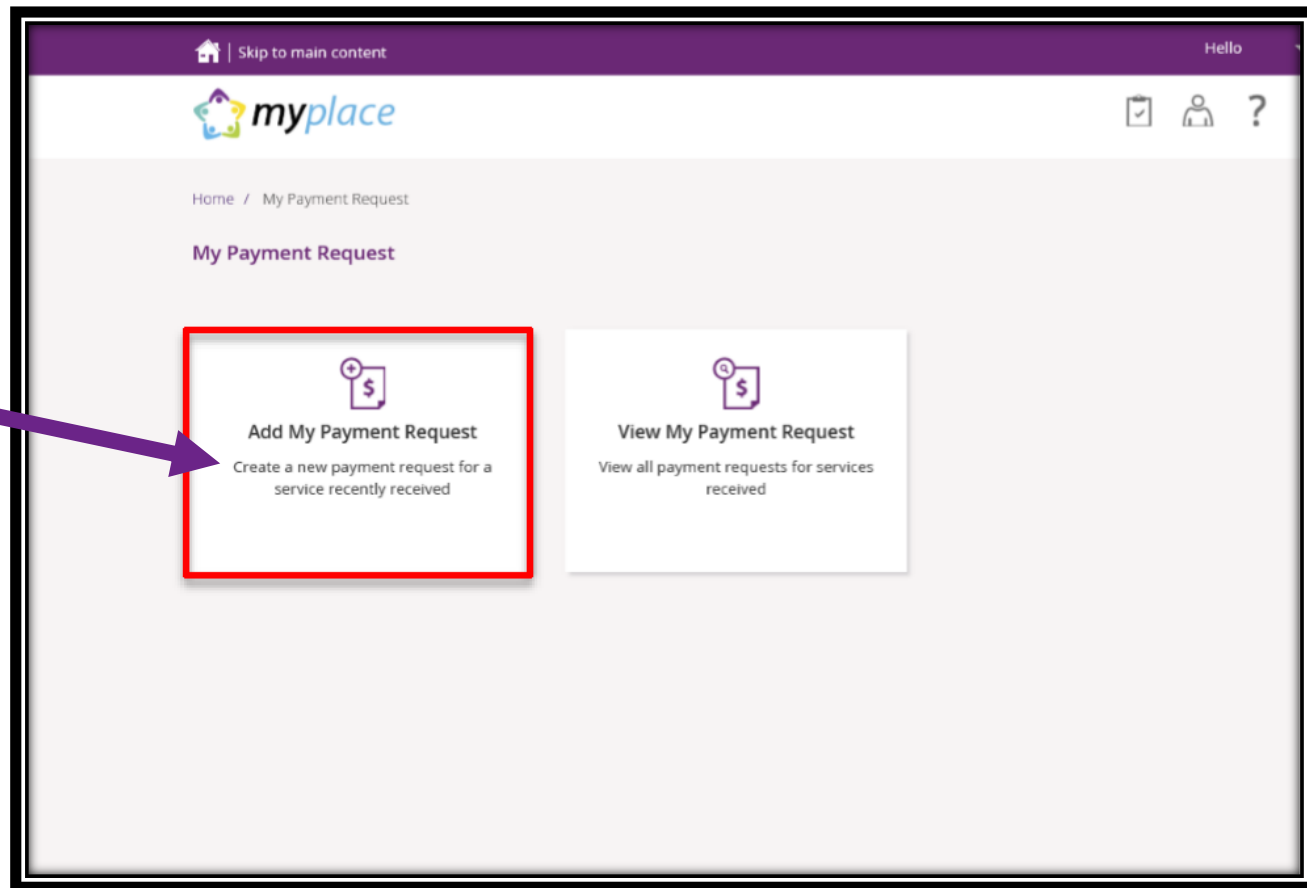
My Payment Request
Manage Payment Request



Add My Payment Request
Create a new payment request for a service recently received



View My Payment Request
View all payment requests for services received



Payment Request



Type in the details of your **Payment Request**. For more than one Payment Request, select **Add Another**. Select Next.

Please Note: Support dates cannot cross over 2 plan dates

A screenshot of the 'myplace' web application interface for adding a payment request. The page has a purple header with a home icon and 'Skip to main content' on the left, and 'Hello' with a dropdown arrow on the right. Below the header is the 'myplace' logo and icons for a checklist, user profile, and help. A breadcrumb trail reads 'Home / My Payment Request / Add'. A purple banner contains the title 'Add Payment Request' and the instruction 'Please enter details of one or more items you wish to request for'. The main form area is titled 'Payment Request Details' with a 'New Payment Request - Help' link. It contains four input fields: 'Support Start Date: *', 'Support End Date: *' (with a calendar icon), 'Payment Amount: *', and 'Support Category: *' (a dropdown menu showing 'Please Select Category'). A note states 'Required fields are marked with an asterisk (*)'. At the bottom are three buttons: 'Cancel' (red), 'Add Another' (green), and 'Next' (blue).

On the **Preview** screen, check that details are correct. Tick the Declaration box then select **Submit**.

Preview
 Please review your payment request before submitting

Payment Request Details

Support Start Date: 06/06/2016

Support End Date: 06/06/2016

Support Category: Daily Activities

Payment Amount: \$85.00

Payment Request Amount Summary

#	Support Category	Total Amount
1	Daily Activities	\$85.00
Grand Total		\$85.00

Declaration*
☐ The support category listed on this payment request will be recorded on my NDIA plan. I understand that I may be audited by the NDIA to verify the amounts submitted in this payment request. I certify that the information provided on this payment request is true and correct.

Back

Cancel

Submit

My Plan Purchases Claim Form



Form



MyPlan Purchase Payment Request Form

Only complete this form to record payments made for supports in your plan if you cannot use on-line payment request tool in the myplace Participant Portal. If you need help using myplace or to make an on-line payment request, call us on 1800 800 110 or talk to your National Disability Insurance Scheme (NDIS) contact.

Participant details

Full name	
Date of birth	DD/MM/YYYY
NDIS number	

The following payments for NDIS self-managed supports have been made

Support Item (Category)	Claim Start Date	Claim End Date	Invoice/ Receipt Date	Amount Paid (GST Inclusive)
Total amount of this payment request (GST inclusive):			\$	

Third party details

Only required if someone other than participant is completing form.

Full name	
Date of birth	
Relationship to participant (must be the plan nominee or child representative)	

Form



Statement

- I confirm that the information provided on this form is true and correct, and meets the guidelines for self-managed supports
- I have not previously claimed these purchases (on-line or using this form)
- I will ensure that all receipts supporting the spent amounts on this form are kept for a period of five years
- I understand that I may be audited by the National Disability Insurance Agency (NDIA) to verify the amounts claimed.
- I understand that giving false or misleading information is a serious offence
- I understand that this information is protected by law and can only be given to someone else where Commonwealth law allows, or requires it, or where I give permission.

Full name	
Relationship to participant (if not participant) e.g. child representative, plan nominee	
Signature	
Date	

- This form needs to be signed and dated.
- A self-managing participant or their nominee can submit the form as often as they prefer. However, we recommend a minimum of once a month.
- Completed claim forms may be scanned or photographed & emailed to finance.wa@ndis.gov.au or dropped at the office for processing. **(3-5 Days)**

Q and A

If you are self-managing and need to pay bills, do you get the money first or do you pay and it gets reimbursed to you? How does this happen?

You can only make a claim for payment once you've received an invoice or receipt from the provider you have chosen to use.

Once you have the invoice, you then have two options:

- You can make the payment and then claim reimbursement of the funds from the NDIA.
- You can claim the expense first – the money should be in your account within 48 hours (depending on your bank) – and then use those funds to pay the invoice.

Recordkeeping

Keep all invoices/receipts

- Keep all invoices and receipts of any claims. You do not need to send the receipts or invoices to us, unless requested.
- We suggest you keep your bank statements, or a printout of the transactions from your NDIS bank account.
- If paying by internet banking we also recommend printing the transactions and attaching it to the invoices/receipts.
- **For your own records** we recommend you attach all receipts being claimed to your copy of the My Plan Purchases Claim form.

NDIA - All records and receipts need to be kept for 5 years

Tax related records (eg. Employee wages etc) need to be kept for 7 years

Methods of Recordkeeping

- Records can be kept electronically or in paper files.
- Write the payment request number on every invoice or receipt
- Scan / photocopy receipts for your own records, or take a photo, as they can sometimes fade.
- If you have any queries, contact us.

Engaging Your Support Worker



As a self-managed NDIS participant, you can choose your service providers, self-employed contractors or you can become the employer.

Employee or Contractor?

The ATO online tool “Employee or Contractor” can help you classify your worker as an employee or contractor for tax and super purposes.

The ATO website also covers everything you need to do for a NDIS Support Worker: Wage, Super, Tax, Workers Comp...

Finding a Support Worker

**Consider
Advertising**

**Consider
pre-employment
checks**

- Experience in working with disability
- Police Clearance
- Relevant Skills

**Consider training
your support
worker**

Service agreements

You will normally need to make a written agreement with your provider(s). This is called a **Service Agreement**.

- Service Agreements should be simple and set out how and when your supports will be delivered.
- Service Agreements can be made between you and your provider, or between another person (like a family member or friend) and your provider.
- Service Agreements are different from your NDIS plan. Your plan lists your NDIS supports, but a Service Agreement is about delivering those supports.



Things you can put in your Service Agreement:

- The supports provided under the Service Agreement
- The cost of those supports
- How, when and where you would like your supports provided
- How long you need the supports to be provided
- When and how your Service Agreement will be reviewed
- How any problems or issues that may arise will be dealt with
- Your responsibilities under the Service Agreement – such as letting your provider know if you can't make an appointment
- Your provider's responsibilities under the Service Agreement – such as working with you to deliver your supports in the right way
- How you or your provider may change or end the Service Agreement.

A Safe Workplace

You have the responsibility of maintaining a safe workplace for any person working on your premises.

A Safe Workplace

- ✓ Maintaining your home so that it is free of risks to health and safety
- ✓ Providing and maintaining safe equipment
- ✓ Providing for safe use and storage of substances
- ✓ Providing adequate facilities for your support worker's welfare
- ✓ Providing proper information, training, instruction and supervision to minimise injury or illness
- ✓ Monitoring the health of your support worker, and the work conditions in your home to minimise injury or illness

Worksafe WA can help

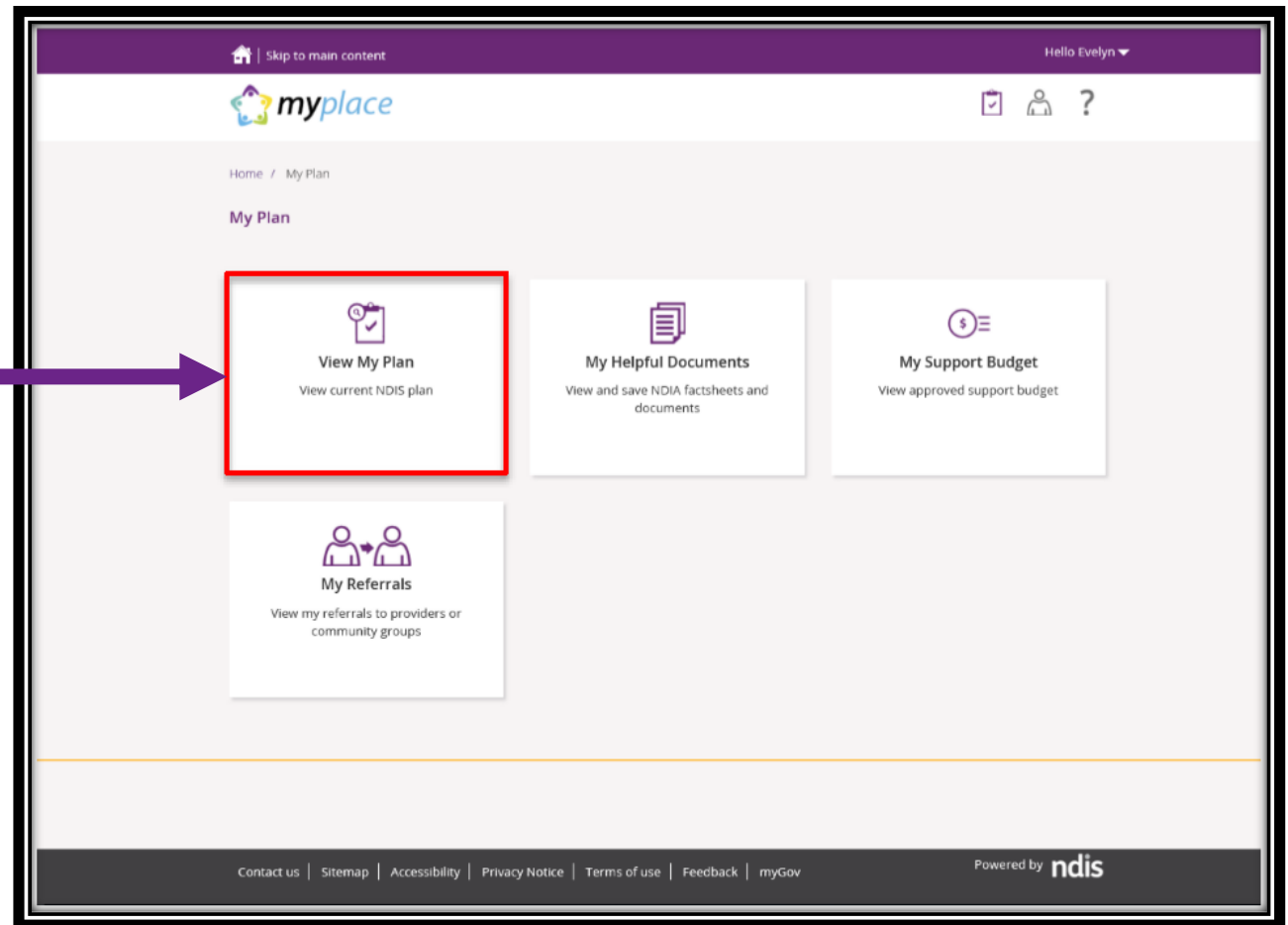
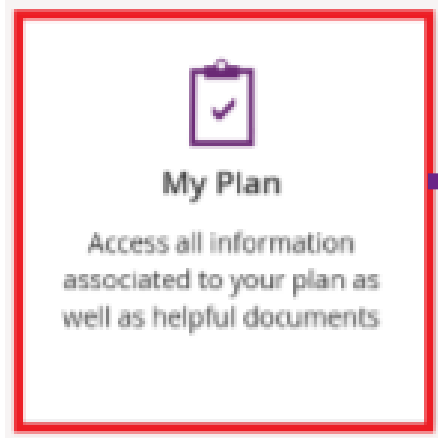
Workers' Compensation Insurance

- It is recommended that you have a workers compensation insurance
- Covers you in case of accidental injury for a Support Worker in your home
- Your insurance premium can be claimed out of your plan
- Claim it against the relevant line item in your plan.
- WorkCover run the workers compensation schemes and can provide you with information

View Your Plan



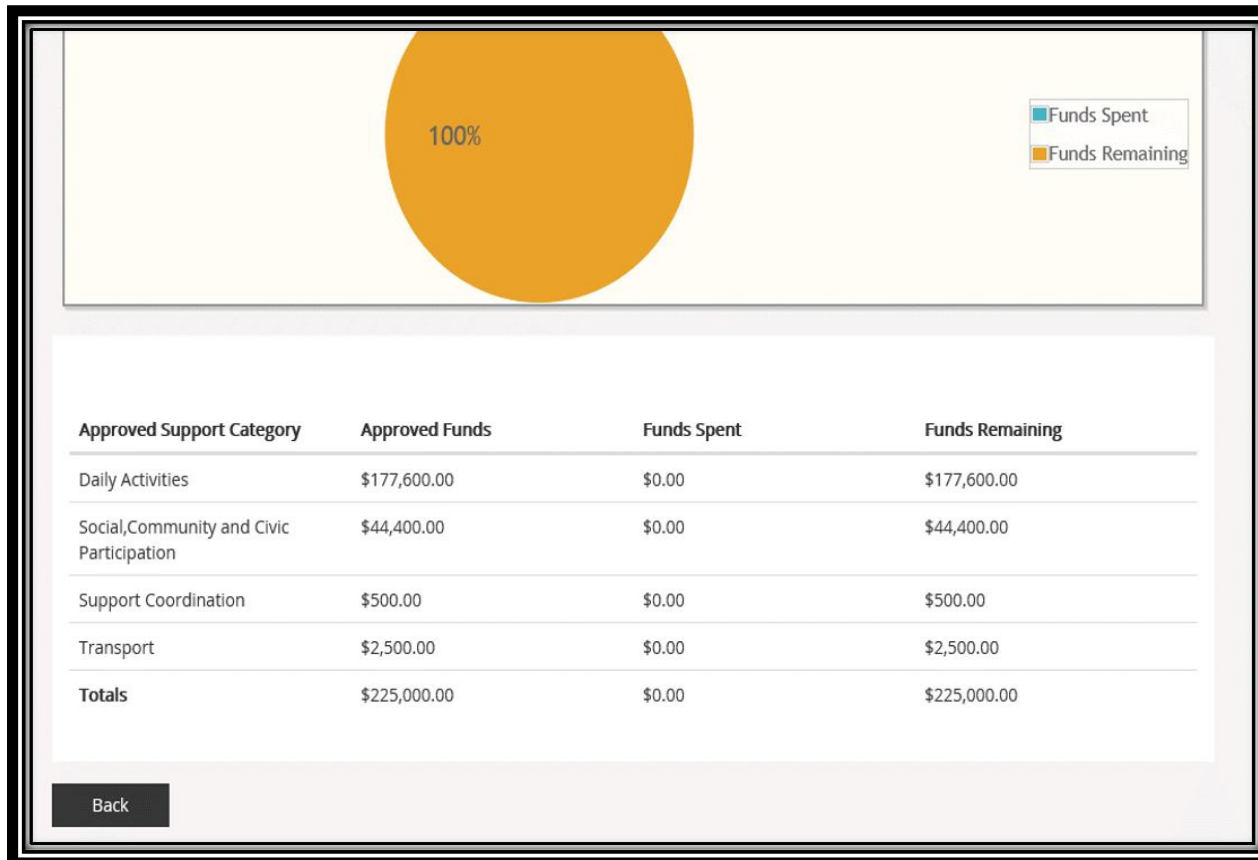
You can **view** your most recent **NDIS Plan**, guideline documents, your support budget and referrals.



View My Support Budget



- Shows your approved funds, funds spent, and funds remaining.
- Reflects payments which have been processed and paid.



Service Bookings



If you are fully Self-Managed there is no need to create service bookings.

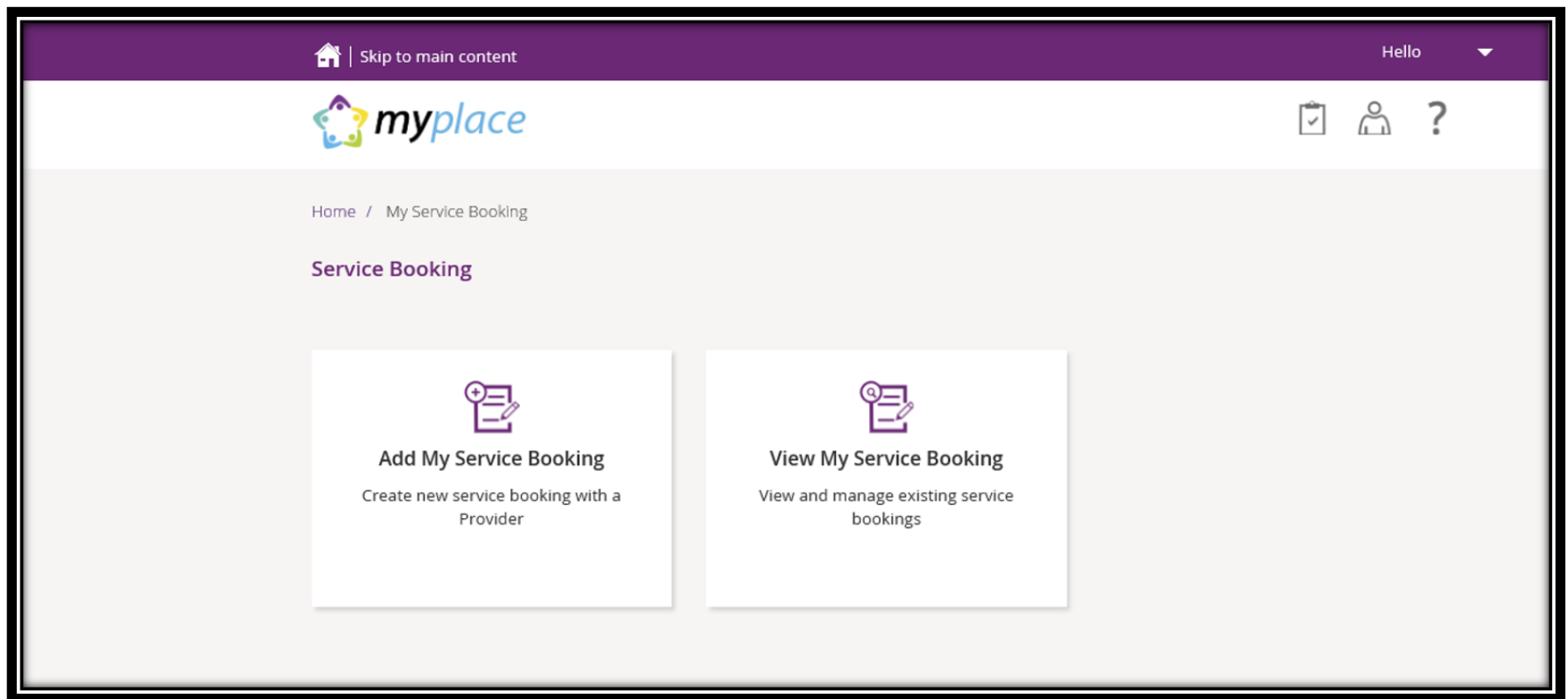
Service Bookings

- Allows you to link your funded supports to your choice of NDIS registered provider
- Shows the type of **support** to be provided, length of **time** it is needed for, and confirms there is **funding available** in your plan to pay for the support.
- Can be created by **Participants**, their nominee, or their **Plan Manager**. A Participant may be supported by an **Agency representative** to complete their Service Bookings and can also ask a **Provider** to do this on their behalf.

My Service Bookings



This section allows you to create and manage your Service Bookings. Service Bookings are important as they lock specific support(s) to a specific provider for a specific time frame



Important links

You may find the following links useful:

- Pricing and payment
(<https://www.ndis.gov.au/providers/pricing-and-payment.html>)
- Find registered service providers
(<https://www.ndis.gov.au/document/finding-and-engaging-providers/find-registered-service-providers.html>)
- Manual self-management claim form
(<https://www.ndis.gov.au/participant/self-managing-budgets.html>)



Questions & General Enquiries?

Visit: www.ndis.gov.au

Phone: 1800 800 110 (8am – 8pm local time)

Email: enquiries@ndis.gov.au

Contact Details – Self-management

Email: finance.wa@ndis.gov.au

Address: National Disability Insurance Agency
Finance Team
Midland Office – Western Australia
GPO Box 700
Canberra ACT 2601

Partners:



Like us on Facebook



Follow us on Twitter @NDIS

**Thank You
for attending
the session
today**



Delivered by the
National Disability
Insurance Agency