



# Tips and Traps: Self-Managing Your NDIS Supports & Services

WORKFORCE **INNOVATION**  
through **SELF-MANAGED SUPPORTS**

A Project of the  
National Alliance of Capacity Building Organisations



# Self-Managing your NDIS Supports and Services

Self-managing your supports and services is the ultimate way that you can have choice and control to help you achieve the goals set out in your NDIS Plan.

Some of the great benefits to self-managing your funding include being able to:

- Design, direct and organise your own services and supports in line with the goals that have been funded in your plan.
- Purchase supports and services from a range of providers and organisations in your local community that are not registered with the NDIA.
- Directly employ someone who you know and trust.
- Be creative and flexible about the type of services you purchase that will help you achieve your goals.
- Have more choice and control over the supports and services you engage.
- Get the best value for money from your NDIS plan.

As a self-manager the different ways that you can buy supports and services to help you achieve the goals set out in your NDIS Plan include:

- Directly employing your own staff
- Engaging self-employed contractors who have an Australian Business Number (ABN)
- Using the ATO Statement by Supplier form for people who do not have an ABN, to make small one-off purchases for services that you are able to support, to justify not withholding payment to the supplier for supports delivered (conditions apply)
- Buying products and services from shops, charities, small not-for-profits, sole traders, or any other type of business.
- Using a host agency to share-manage your funding
- Using online Hiring Platforms
- Hiring registered NDIS service providers





## **DIRECTLY EMPLOYING YOUR OWN STAFF**

You can choose to employ your own support workers; however, you need to be aware that there are legal responsibilities that come along with being an employer such as:

- Recruiting and training your staff
- Withholding staff tax and paying it to the ATO
- Withholding and paying superannuation
- Making sure that you have workers compensation and other insurances
- Negotiating the rate of pay and conditions and ensuring compliance with the Social, Community, Home Care and Disability Services Award 2010 or other relevant award
- Paying wages on the due date, and giving out group certificates at the end of the financial year
- Following work health and safety obligations
- Making sure your workers have a current National Police Clearance, as well as a Working with Children/Working with Vulnerable People Screening checks if required.

There are some great online resources where you can find out more information about directly engaging your own supports:

<https://www.ndis.gov.au/html/sites/default/files/Directly-engaging-my-own-staff.pdf>

[https://www.myplace.org.au/downloads/MyPlace\\_EngagingBooklet\\_Web.pdf](https://www.myplace.org.au/downloads/MyPlace_EngagingBooklet_Web.pdf)

<http://waindividualisedservices.org.au/wp-content/uploads/2017/10/Engaging-Your-Own-Supports-Accessible.pdf>

<http://pearl.staffingoptions.com.au/Article/Index/1011>

<https://www.fairwork.gov.au>

## **ENGAGING INDEPENDENT CONTRACTORS**

You can choose to buy supports and services from independent or self-employed contractors.

An independent or self-employed contractor is a person(s) who has their own business, will have an Australian Business Number (ABN) and are usually responsible for managing their own insurance, tax and superannuation. Independent contractors can set their own fees and charges and can say when they are able to work for you.

Private speech therapists, occupational therapists, cleaners and support workers are a few examples of contractors that you can buy supports from if you self-manage your NDIS plan.

## **ENGAGING REGISTERED PROVIDERS**

You can choose to buy supports and services from registered NDIS providers to help you to achieve the goals set out in your NDIS Plan. If you self-manage your NDIS plan, registered providers will give you an invoice after the support has been provided and you can pay them directly from funding allocated in your NDIS plan.

Registered NDIS providers need to comply with certain rules to make sure people are safe and get high quality supports. The rules are set out in the NDIS Quality and Safeguarding Framework that will be monitored by The NDIS Commission,



<https://www.ndiscommission.gov.au> a new independent agency that is now rolling out across states and territories.

### **ONLINE HIRING AND CONNECTING PLATFORMS**

There are some excellent, simple online platforms that use technology to help you to find, hire and manage your support workers. Online platforms use different ways to hire, link you to, or engage support workers - some use independent contractors, whereas others will directly employ staff through their agency. Online hiring platforms need to be registered as providers in each local state, so before you hook up with an online hiring platform, make sure that they are registered in your state or territory and understand how they will engage your support workers.

### **SHARED MANAGEMENT OR HOST AGENCY ARRANGEMENTS**

A shared management or host agency arrangement enables you to self-manage your supports and services with the backup of an organisation that can assist you with the tasks of self-management such as pay roll, superannuation, Workers Compensation, ATO requirements. A host agency can also assist you to recruit, coordinate and help with training your staff for a fee that you can negotiate with them.

### **PEER SUPPORT NETWORKS**

Peer Support Networks are a great place to get information and support from people who have knowledge and experience about the NDIS. People who choose to self-manage their supports often find a point of connection through peer support networks to get information that can help to navigate the NDIS systems and processes. Peer Connect is a website that has lots of useful information with links to Peer Support Networks operating in your local area: <https://www.peerconnect.org.au>

### **Local Facebook Groups**

There are lots of new Facebook groups being set up and run by people who are self-managing where you can get support.

#### **Facebook Groups**

- <https://www.facebook.com/groups/WaFamiliesSupportWorkersNetwork/>
- <https://www.facebook.com/groups/896104837175411/>
- <https://www.facebook.com/groups/896104837175411/>

### **PLAN MANAGEMENT**

Plan-management is another way that you can self-direct your supports and services to help you achieve the goals stated in your plan. You can choose to have a Plan Manager and the NDIS will pay for this support which will be a separate line item in your plan. Your Plan Manager can pay staff, providers and contractors on your behalf. A Plan Manager needs to be registered with the NDIS but any supports and services that you choose are not required to be registered providers. As a Self- Manager you set the price for your supports and services

and price caps do not apply, however Plan Managers can't pay more than the NDIS sets in the price guide.

## Tips and Traps: Self-Managing your NDIS Supports and Services

Having NDIS funding to engage your own supports and services means that you have control and 'purchasing power'. There are many businesses, independent contractors and providers that will warmly welcome you as a customer and this puts you firmly in the driver's seat. You can negotiate prices and if you're not happy with the service that is provided you can go somewhere else.

### TIPS:

- Employing your own staff can be a big change for people who have been used to having support workers directly from a service provider. However, **you do not have to do everything yourself**, you can delegate many of the admin and day-to-day management tasks, e.g. you can pay a bookkeeper to handle a lot of the administrative responsibilities: payroll, tax, workers compensation, superannuation, insurances.
- You might want to consider engaging contractors and organisations in your local community; people in your neighbourhood often offer a more personal touch and are likely to want to get to know you well to secure repeat business. This can help you to **build a network** of local supporters, as well as **create new opportunities** for you to get to know more people in your neighbourhood.
- Some suppliers may not be required to quote an ABN if they meet certain criteria. You might consider this if, for example, you want a simple one-off service from a person who lives in your neighbourhood. You can ask the Supplier to provide you with a **Statement by Supplier** form for your records:  
<https://www.ato.gov.au/forms/statement-by-a-supplier-not-quoting-an-abn/>.
- Hiring the right employee, contractor or service provider to assist you to achieve your goals is important. You need to make sure they are the right match for you and that you are confident they are the right person/service to work with you. Make sure you do reference checks or get someone else to do them for you, as people will be coming into your home. Do your research, ask friends allies and peer support networks about who they use and whether they would recommend the person or service. **Look out for good testimonials about the skills and qualities** of supports and service providers.
- Getting the right support staff in place and building your team of workers who you can trust and get to know well is extremely important. Good support workers are like hot property – they go fast! **Look after and acknowledge your team**; consider providing small incentives and/or fund training and development opportunities to help them to build their skills.



- Developing a **simple service agreement** is useful, you can have either a written or verbal contract which states what service will be provided to you and how the supports will be provided and paid for. Your contractor or provider may have their own standard service agreement, or you can create your own. Here is a sample model service agreement:  
<https://providertoolkit.ndis.gov.au/sites/g/files/net3066/f/samplemodelserviceagreemntv2.0.pdf>
- Don't be afraid **to reach out and seek advice**; whether it's a friendly tip from a peer, professional advice from an accountant or support from a host provider. Asking for help when you need it can be very useful in building a network of people who you engage to assist you to think through any issues that arise and who may take on delegated roles.
- **Having a go-to person(s)** in your corner is useful, as sometimes things don't always go according to plan, e.g. if a support worker does not match well with you and you need to let them go. These are often difficult conversations and it may be useful at these times to seek out support from a knowledgeable peer support coordinator or a host agency.
- If you want to self-manage your funding but are not sure if you're ready for that task, you can ask for support in your NDIS plan to **develop the skills you need**. You don't have to self-manage all your funding, you might want to choose to self-manage one part of your NDIS support budget in your plan. This is a great way to start and help you build skills and confidently manage future supports and services.

## TRAPS:

- Self-management does come with responsibilities and you need to be able to show that your **NDIS funding is being spent and managed properly**. You should set up a separate bank account for NDIS funding, this will make it easier for you to see what money is coming in and what payments are going out, as well as accounting for your spending. The NDIA do undertake random payment testing so you need to get yourself organised if you self-manage. Invoices, receipts, pay slips and bank statements need to be kept for five years. You can store records online or anywhere that is safe and easy to access that works for you.
- The NDIS Portal can take time to understand and be frustrating to navigate, but the good news is that **the NDIA is constantly working on improving the portal**, so it will get better and easier over time.
- For every worker that you engage, you need to look at the specific working arrangement **and decide whether that person is an employee or a contractor**.
- To help you work out whether your worker or provider is an employee or contractor for tax and superannuation purposes go to the ATO website:



<https://www.ato.gov.au/Business/Employee-or-contractor/How-to-work-it-out--employee-or-contractor/>

- As more people roll into the NDIS it is going to be increasingly competitive to get good supports and services. Be aware that there is likely to be a shortage of staff working in the disability sector over the next few years, so **get creative about how you recruit your support team.**

### **Be aware of Scammers!**

The NDIS is big business and some people will be attracted to the scheme for the wrong reasons. The Australian Competition and Consumer Commission (ACCC) has put out a warning for people with a disability to be aware of scams. Scammers will adopt a range of delivery methods to contact you such as a phone call, text message, email, through an online forum, or even face-to-face by knocking on your door. Scammers are looking to obtain your personal information or steal your money.