

VALID NDIS Tip Sheet 9 – NDIS Funding

Understanding How NDIS Funding Works

The following are common questions about NDIS funding. They have been answered in the context of the different ways to ‘manage NDIS funds’ e.g. Agency, Plan or Self-Managed.

Questions about NDIS funding	Agency Managed (leave funds with NDIA)	Plan Managed (using NDIS Registered PM)	Self-Managed (you manage funds)
Who pays the provider/s I purchase?	They claim on the portal off NDIA	Plan Manager if account is not paid	Participant or nominee
If I've paid an account can, I get reimbursement?	Not usually	Yes – you can claim reimbursement off PM if have a tax receipt	Yes - you can claim reimbursement via Portal based on receipt
Who makes the claim on the NDIS Portal?	Registered Provider	Plan Manager (PM)	Participant or nominee
Who is responsible for maintaining the paperwork on claims for 5 years?	NDIA	Plan Manager	Participant or nominee
How do I know how much funding I have left in each budget?	NDIS Participant Portal provides 'rough' balances	Most Plan Managers can provide you with balances	Use Portal & it is advisable for Self-Managers to keep their own records
Can I use my local accountant (unregistered) as my PM (Plan Manager)?	No	No	Yes – you can pay for assistance with financial management of Plan
Do I need to pay providers first & then claim the funds back?	No	No – unless provider wants payment prior to support e.g. continence product; therapist	No – unless provider wants payment prior to support e.g. continence product; therapist
Do I need to approve each payment from the Plan?	No – you don't see any invoices or payments	No, however it is recommended that you check & approve invoices	Yes as you are responsible for making legitimate claims
Can I use unregistered providers?	No	Yes – you can use contractors; Registered, unregistered & other entities with an ABN	Yes – you can use contractors; registered, unregistered & other entities with an ABN
Can I pay providers more than the NDIS Price Guide set unit price?	No	No (some exceptions where co-payment)	Yes
If I choose to manage my funds this way does it improve flexibility of funds?	No – except for bundling Core Supports	No – except for bundling Core Supports	Yes – there are a range of ways you can improve flexibility
Can I employ my own workers directly?	No	No	Yes – if you run/set up a business entity that employs the staff
If the NDIS Prices increase, will my plan funds increase in line with this?	Usually Yes	Usually Yes	Usually yes
I do not have enough Transport Budget can I use other Core Supports funds?	Yes, if Transport is not paid fortnightly	Yes, if Transport is not paid fortnightly	Yes (refer to pg 2 for more details)
I don't have any Transport funding can I use other Core Support funds for this?	No	In some cases - see next page #	No

Transport Funding Flexibility

Automated Transport Payments

If you have all your Transport Budget paid fortnightly into your bank account (sometimes called 'periodic payment') then you cannot 'top up' your transport budget from your other Core funding.

Be aware that planners may refer to this option as 'self-managed' transport, but it is actually not the same as true self-management where you claim invoices on the Portal and pay providers directly.

How do I get flexibility of Transport Budget?

The NDIS allows participants to use their Core Supports Budgets flexibly, i.e. use Budgets 1 – 4 i.e. 1. Daily Living; 2. Transport; 3. Consumables; 4. Social & Community Participation, as a combined budget. This means that you can move funding between these four categories, such as, use Daily Living funds to top up your Transport funds, thereby increasing the amount of transport you can claim.

Exceptions to topping up include:

- Any funds in Core Supports that are marked as 'Stated' cannot be used for any other purpose than what is allocated in your Plan i.e. cannot be used to top up other Core budgets
- # If you are not allocated any funds in your Category 2 Transport Budget, you cannot use other Core funds for transport to employment or school, but services can charge for workers to transport a participant to a community activity using Category 4 Social & Community Participation

What the words mean?

Budget

Refers to the funds allocated to a Support Category (i.e. there are 15 categories in the NDIS Price Guide) in a NDIS Plan. Plans usually have 'combined' funds e.g. all of the first 4 categories are referred to as the 'Core Support Budget'.

Registered Provider

A person or organisation who provides NDIS services and who has successfully met the requirements of the NDIA to become a NDIA registered service provider. This enables them to be funded directly by the NDIA for supports provided to NDIA participants

Self-management

Where participants manage the funds and claiming of invoices from the NDIS and the payment of providers themselves, for all or part of their NDIS funding. Or for transport it is receiving transport \$ in fortnightly instalments into their own bank account, from which they then pay for transport.

Key NDIS Acronyms

AT	Assistive Technology
CB	Capacity Building
LAC	Local Area Coordinator
PM	Plan Manager/Management
SDA	Specialist Disability Accommodation
SIL	Supported Independent Living
SNA	Support Needs Assessment (from July 1 st 26)

More Information

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