

Keeping Records

When you manage your own NDIS plan, it is important to keep all your documents for **five years**. This helps you stay organised and makes it easier to manage your funds. You can keep these documents online or as paper copies.

What Records to Keep:

1. Service Agreements and Contracts

Keep copies of all agreements and contracts with your service providers. These should explain the services you will get, the costs, and the terms of service.

2. Invoices and Receipts

Keep all invoices and receipts for services and supports you pay for with NDIS funds. This includes receipts for equipment, therapy sessions, and other expenses.

3. Bank Statements

Keep copies of any bank statements that show your NDIS spending. This helps you track your spending and make sure funds are used correctly.

4. Progress Reports and Outcomes

Keep any [progress reports](#) from your service providers. These reports should show your progress towards your goals and include recommendations for future support.

5. Communications Records

Save copies of all written communication with the NDIS and service providers, including emails and letters.

6. Plan Documents

Store a copy of your current NDIS plan and any previous plans. This helps you track changes over time.

7. Quotes for Services and Equipment

Keep all quotes you get for services and equipment, even if you don't use them. This helps with future budgeting.

8. Meeting Notes

Keep notes from any meetings or discussions about your support needs, goals, or plan management.

9. Audit Documentation

If the NDIS [audits](#) you, keep a copy of the audit report and any documents you provided.

10. Review Documentation

Keep any documents from plan reviews, including notes you took during the meeting.

Organising Paper Records

- **Use a Diary or Calendar:** Write down service types, amounts, payment details, and keep receipts in an envelope for each month.
- **Create a Filing System:** Set up a filing system with folders to sort paper documents by type. For example, have separate folders for contracts, invoices, and reports.
- **Name Folders Clearly:** Label each folder clearly so you can find what you need quickly. Use descriptive names like "2024 Receipts" or "Service Agreements" to make it easy to identify contents at a glance.
- **Keep Everything Together:** Use a binder or box to store all related documents in one place. This helps prevent documents from getting lost and makes it easier to access everything when needed.
- **Organise by Category:** Within your main folder (e.g., "NDIS Plan 2022-2024"), create subfolders for each support category (like Core Supports, Capacity Building). Inside each category, have folders for different types of documents (like service agreements, invoices, and correspondence).

Organising Digital Records

- **Create a Spreadsheet:** Use a simple table to track services, amounts, payment dates, and claims received. This helps you stay organised.
- **Organise Documents:** Make folders on your computer or cloud storage (like Google Drive) to sort documents by NDIS plan or service type. Use clear names for each folder.
- **Scan and Save Receipts:** Use a scanner or mobile app to keep digital copies of receipts that might fade over time. This ensures you have a backup.
- **Record Purchase Reasons:** Write down why you made a purchase in case you need to explain it later. This can be helpful for audits or reviews.
- **Use Email Folders:** Create folders in your email to save important NDIS documents like invoices and claims. This makes it easy to find what you need quickly.

Benefits of Good Organisation

- **Easy Access:** A well-organised filing system allows you to quickly locate documents without searching through piles of paper.
- **Streamlined Workflow:** Keeping everything sorted helps you manage your NDIS plan more effectively.
- **Improved Record Keeping:** A clear structure reduces the risk of losing important documents and ensures that you have everything you need when required.

Why Keeping Records is Important

Effective record keeping helps you manage your supports better and make informed decisions about your care. It ensures you get the most out of your NDIS. The NDIS may conduct [audits](#) to check how self-managed funds are being spent, so having organised records is essential.