

# Welcome Pack

## Specialist NDIS Plan Manager

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### Your pack includes:

OUR INFORMATION FLYER

PLAN MANAGEMENT PROCESSES

SERVICE PROVIDER INVOICING GUIDE

OUR SERVICE AGREEMENT

w: [essentialplan.com.au](http://essentialplan.com.au)  
p: 0474 329 544  
e: [admin@essentialplan.com.au](mailto:admin@essentialplan.com.au)



# Welcome to EPSS



## Plan Management Services You Can Rely On

At Essential Plan Support Services (EPSS), we offer a personalised support.

- ✓ We prioritise providing a compassionate and friendly service, understanding the frustrations you may encounter.
- ✓ Our approach involves actively listening to you and asking, "How can we assist YOU?"
- ✓ We ensure a swift payment process for service providers and resolve issues promptly.
- ✓ We are committed to processing NDIS Compliant Claims.
- ✓ You can expect monthly reports and have the option to access our app to track your funding and invoices.
- ✓ We aim to collaborate effectively with your other service providers to meet your needs.



We support the

**ndis**



Essential Plan  
SUPPORT SERVICES

Registered NDIS Provider



### AS YOUR PLAN MANAGER, WE GIVE YOU:



Choice & control over your services & products



Responsive communication



A team approach



Prompt invoice payment



essentialplan.com.au

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# Service Provider Invoicing Guide

## DEAR SERVICE PROVIDER

Our team at Essential Plan Support Services (EPSS) is here to ensure prompt and accurate processing of invoices. Below is a comprehensive guide to help you meet NDIS requirements and expedite the payment process.

## WHAT DOES THIS MEAN FOR YOU?

- Send invoices to [invoices@essentialplan.com.au](mailto:invoices@essentialplan.com.au).
- Add your client's email address in the CC field.
- Invoices are paid within 1-2 business days of receiving funds from the NDIA.
- Occasionally, payments may take a little longer due to missing or incorrect information. In this case we will endeavour to resolve the issues quickly.

## EPSS Contact Details

If you have any questions regarding this invoicing guide, please contact EPSS.

[admin@essentialplan.com.au](mailto:admin@essentialplan.com.au)

0474 329 544

## 1. DETAILED INVOICE COMPONENTS

Ensure each invoice includes the following:

✓	Full Name or Business Name and Contact Details
✓	Valid and Active ABN
✓	Unique Invoice Number and Date
✓	Bank Details
✓	Client's Full Name and (if available) their NDIS Number
✓	Date of Service(s)
✓	Description of Services(s) per the NDIS Pricing Arrangements and Price Limits (PAPL) and/ or Line Item per the NDIS catalogue
✓	Duration of Service(s)
✓	Hourly Rate
✓	Number of Kilometres and Applicable Rate (if relevant)
✓	Total Amount Due

## 2. COMMON MISTAKES TO AVOID

✓	<b>Incorrect or Missing ABN:</b> Ensure the ABN is correct and valid.
✓	<b>Incomplete Service Descriptions:</b> Provide complete descriptions per PAPL to avoid confusion and delay. For example, the term "support work" is not descriptive enough as support work can be provided in various settings (in the home and in the community). The line item for claiming will differ depending on the type of support work.
✓	<b>Wrong Client Information:</b> Double-check that all client information, including the NDIS number and full name (not nickname), is accurate.
✓	<b>Mismatch in Dates:</b> Verify that the service date and the invoice date are correctly entered.
✓	<b>Total Amount Calculation Errors:</b> Ensure the total amount due is accurately calculated based on the services rendered.

### 3. INVOICE SUBMISSION TIPS

✓	<b>Timely Submissions:</b> Submit invoices promptly after the service is provided.
✓	<b>Check invoice email:</b> Ensure you send the invoice to the correct email address.
✓	<b>Keep Records:</b> Maintain a record of submitted invoices for future reference and follow-ups.

### 4. TOOLS AND TEMPLATES

✓	<b>Invoice Templates:</b> Use pre-designed templates available on platforms like Canva.com or Word templates to maintain consistency and professionalism.
✓	<b>Accounting Software:</b> Consider using accounting software like Xero or MYOB to manage your invoicing and financial records.
✓	<b>Accountant/Bookkeeper:</b> Contact your accountant or bookkeeper to make sure you meet ATO requirements.

### 5. RESOURCE REFERENCES AND SUPPORT

✓	<b>NDIS Invoicing Guidelines:</b> Familiarise yourself with the official NDIS invoicing guideline.
✓	<b>NDIS Pricing Arrangements and Price Limits (PAPL):</b> Make sure you do not charge above the allowable rate. This is also where you will find the correct line item/s.
✓	<b>Support Networks:</b> Join support networks or forums where you can share experiences and get advice from other independent support workers.
✓	<b>NDIS Website:</b> For information on being an NDIS Provider.
✓	<b>NDIS Provider Support:</b> For questions about being an NDIS Provider, email <a href="mailto:provider.support@ndis.gov.au">provider.support@ndis.gov.au</a> .

### 6. FINAL QUALITY CHECK

✓	<b>Proofread:</b> Always proofread the invoice for any errors before sending it out.
✓	<b>Consistency Check:</b> Ensure consistency in formatting and information across all invoices.
✓	<b>Confirmation:</b> Double-check with the Detailed Invoice Component list to ensure all required details are included and comply with NDIS standards.
✓	<b>Client Approval:</b> Consider obtaining client approval for the invoice details before the final submission to avoid any disputes.

## *Interested in Streamlining Your Invoice Processing?*

As an NDIS provider, you must meet the NDIS invoicing requirements and the NDIS Pricing Arrangements and Price Limits. At EPSS, our role as plan managers is to process correct and approved invoices, and our agreement is with the participant. While administrative support, such as advising providers on invoicing, falls outside our compensated scope, we understand that having accurate and compliant invoices is crucial.

If you feel you need additional help to streamline your invoicing process, we can provide this service to you for a fee. This is a business expense to you and is not covered by NDIS funding. You are welcome to book a consultation to better understand how to invoice correctly, meet NDIS requirements, and get paid quicker.

**To book a consultation, please email Cathy at [cathy@essentialplan.com.au](mailto:cathy@essentialplan.com.au).**

# Our Plan Management Processes



## 01 HOW TO START

For us to manage your NDIS funding and your invoices, we require:

- For us to be endorsed if you have a PACE plan
- Our Service Agreement filled in and signed
- Your NDIS plan
- NDIS Consent Form filled in and signed

## TRANSPARENCY

At the end of each month, you will receive a statement showing all the transactions. You can also check your funding anytime online.

## 06

## PAYMENT IS MADE

Once the funds are approved and released to EPSS, we will pay your providers' invoices or your reimbursement. This whole process takes 3-5 business days.

## 05

## SUBMISSION TO NDIS

We submit a request to the NDIS portal to have funds released for payment to providers.

## 04

## ONCE WE HAVE RECEIVED THE INVOICE

We will process the correct and approved invoice and allocate requested funds to an appropriate support category and line item.

## 02

## ONCE YOU ARE ONBOARD

**OPTION 1** Your provider sends their invoices directly to [invoices@essentialplan.com.au](mailto:invoices@essentialplan.com.au)

**OPTION 2** You can have invoices sent to you first and then you forward them to us.

If you pay for something, we will require a receipt and then we will reimburse you.

## 03



## Useful Information

- If you are unsure if you can purchase something, ask your Local Area Coordinator, Support Coordinator or EPSS.
- We cannot process payments without an invoice.
- You can use any service provider, they do not need to be registered, however they must have an ABN and not be an immediate family member.
- We need to have your latest plan at all times, otherwise we will not be able to process invoices
- If you have paid for an item, you must provide proof of purchase and highlight that it is you, we should reimburse. Use the **EPSS Reimbursement Claim Form**.

# NDIS Plan Management Service Agreement



Registered NDIS Provider

## Parties

This Service Agreement is a contract between you, the Client or your Authorised Representative, and Essential Plan Services Pty Ltd trading as Essential Plan Support Services (EPSS) to assist you manage your NDIS Funding. This Service agreement represents all terms and conditions, policies, rights, and responsibilities associated with being a client of EPSS.

This Service Agreement will be in effect from the date the Client or Authorised Representative signs this Service Agreement or accepts the Service Agreement online. It will continue until either party terminates this agreement in accordance with **Clause 2 of the Terms and Conditions**.

## EPSS Contact Details

If you have any questions regarding this Plan Management Service Agreement, or for more information, please contact EPSS.

[admin@essentialplan.com.au](mailto:admin@essentialplan.com.au)  
0474 329 544

Participant Details			
First Name			Preferred Name (optional)
Last Name			Date of Birth
Gender Identity	M	F	Other:
Preferred Pronouns (optional)			Country of Birth
Email			Cultural Information
Phone Number			
Residential Address	Street		
	Suburb		
	State		
	Postcode		
Mode of Contact Preferred	Email	Call	Text
			Other essential information (Health conditions, Allergies, Behaviour, etc)

Authorised Representative			
Does the participant have an Authorised Representative*	Yes	No	*An immediate parent/guardian, a person appointed by the NDIA as a Plan Nominee or a Third-Party legally appointed Guardian.
First Name			
Last Name			
Email			Phone Number
Residential Address	Street		
	Suburb		
	State		
	Postcode		
			Relationship
			Description of Relationship
			Immediate Parent/Guardian
			A person appointed by the NDIA as a Plan Nominee
			Third-Party legally appointed Guardian

# NDIS Plan Management Service Agreement



Registered NDIS Provider

## NDIS Plan – Please Provide a copy of your Plan

Your NDIS Number			
Plan start date		Plan end date	
Is this your first plan?	Yes	No	
<p><b>**Plan Extension</b> - To ensure continuity of service, where a plan is automatically extended by the National Disability Insurance Agency (NDIA), this agreement remains in effect in line with the extended period. Any service bookings made by Essential Plan Support Services will be amended accordingly.</p>			
How did you find us?	Support Coordinator	LAC or Planner	Google Clickability
	NDIS Provider Directory	A Friend	A service provider (not support coordinator)
	Facebook page/ad	Facebook Group	My Community Directory
	Another NDIS Participant	Other (please specify):	

## Support Coordinator/Recovery Coach Details

Please provide details of the Support Coordinator or Recovery Coach business with whom Essential Plan Support Services can share information for the purposes of providing plan management services under the Service Agreement with the Participant/ Authorised Representative.

In the event that a new Support Coordinator or Recovery Coach is engaged within the same organisation, this consent to share remains in effect.

Name		Phone Number	
Company			
Email			

## Bank Details (for reimbursements)

Account Name			
BSB		Account No.	

## 1. Schedule of Supports

EPSS agrees to provide services relating to the attached Schedule of Supports provided funds are available for EPSS to access on the National Disability Insurance Agency (NDIA) portal.

## 2. Changing or ending this Service Agreement

Either Party may end this Service Agreement at any time giving the other party **5 days' notice in writing**. If a party materially breaches this Service Agreement, the other party may terminate this agreement immediately by notice in writing.

## 3. Goods and services tax (GST)

- For the purpose of GST legislation, the parties confirm that:
  - A supply of supports under this Service Agreement is a supply of one or more of the Reasonable and Necessary supports specified in the statement included, under subsection 33(2) of the NDIS Act, and in your NDIS plan currently in effect under section 37 of the NDIS Act.
  - EPSS will pay GST as specified in the NDIS Act.

## 4. Things EPSS will do (our responsibilities):

- Treat you/your Authorised Representative with courtesy and respect.
- Assist and support you or your Authorised Representative to spend your NDIS funding in accordance with your NDIS Plan, the requirements of the NDIA or the Australian Taxation Office (ATO), as requested.
- Make budget information available via the plan management portal and monthly statements.
- Communicate with you in an honest and open manner.
- Have mechanisms in place to manage and mitigate potential conflicts of interests.
- Reserve the right to raise any concerning conduct or behaviours with you/your Authorised Representative and seek a satisfactory solution.

## 5. You agree to (your responsibilities):

- Treat EPSS staff with courtesy and respect.
- Ensure NDIS funds are used to assist you to achieve your NDIS Plan goals and are spent in accordance with your NDIS Plan per section 46 of the NDIS Act.
- Monitor budget information made available by EPSS to reduce the risk of overspending.
- Ensure that all claims for reimbursements include evidence of payment having been made to the extent requested by EPSS and in accordance with the NDIA or the ATO requirements.
- Talk to us if you have any concerns about our service.
- Give EPSS the required notice if you need to end the Service Agreement per **Clause 2 Changing or ending this Service Agreement**.
- Let EPSS know immediately if your NDIS plan is suspended or replaced by a new NDIS plan or you stop being a participant in the NDIS.
- Not engage in conduct or knowingly provide misleading information which may reasonably be expected to:
  - Expose EPSS to reputational, regulatory, or financial risk.
  - Present a work, health, and safety risk to any EPSS staff. This extends to and includes any verbal or written abuse.
  - Be contrary to the NDIS rules, guidelines, or relevant policies.
  - Be contrary to or cause EPSS to potentially breach, the NDIS Act or any other law or regulation; including conditions which relate to the registration requirements of EPSS.
  - Be intended to otherwise obtain funds to which the person is not entitled within the meaning of section 182 of the NDIS Act.

## 6. Service Provider Claim

- EPSS will process the invoices submitted by your Service Providers to the NDIA portal, provided that:
  - The invoices meet the NDIA and the ATO requirements.
  - The supports are consistent with your NDIS Plan and service agreements.



### 7. Privacy

#### As per the Privacy Act 1988:

- Your information is collected, recorded and stored on a secure case management system.
- Any paper documents created will be scanned and uploaded to your file, and then shredded.
- Your case management file is only visible to the staff member who works with you and the management team who support them.
- The information on your file is gathered throughout the course of your service and includes your name, street address, contact details and other sensitive information relevant to the provision of services.
- We will also write notes relevant to your service which will be recorded and maintained on the case management system.
- You are entitled to access relevant information contained within your file at any time subject to relevant legislation provisions. Please note that provision of information may take up to 14 days to collate and dispatch.
- You are entitled to withdraw consent for us to collect and keep your information at any time.
- EPSS will keep your records for 7 years from the end date of services. For children this information will be kept until they turn 25 years of age. They will then be deleted from our case management system.

### 8. Feedback, complaints, and disputes

EPSS welcomes any feedback – positive or negative. Complaints are seen as an opportunity to make our services better. We have a Complaints Policy which you can see on request.

If you wish to give feedback or make a complaint about services there are a few ways you can do this:

- Contact Cathy Turner, Director of EPSS  
**0498 354 750**  
**cathy@essentialplan.com.au**
- You can also use the feedback link on our website **www.essentialplan.com.au**

You may like to have another person assist with the complaint. This could be a family member or friend or we can link you to an advocate if you would like us to do this, go to [www.dss.gov.au](http://www.dss.gov.au) and search for the National Disability Advocacy Programme information.

You can take your complaint to the NDIS Quality and Safeguarding Commission. You can contact them by:

- phoning 1800 035 544 (free call from landlines) or TTY 133 677. Interpreters can be arranged.
- Or you can call the National Relay Service and ask for 1800 035 544.
- Or you can complete an online form by clicking on this link:  
**www.ndiscommission.gov.au/about**
- More information about the National Quality and Safeguarding Commission is found here:  
**www.ndiscommission.gov.au/about** and specifically about complaints here:  
**www.ndiscommission.gov.au/about/complaints**

## Audit information and Opt-in Form

**As part of EPSS' registration process with the National Quality and Safeguarding Commission, we will undertake an audit as required.** We will appoint an auditor who will check our service against practice standards, to make sure we are doing a good job, and can continue to provide services to participants.

The auditor will check our written records, our policies and procedures and will also talk to our staff and our participants about our services. They will want to speak to participants who have received our services, likely over the phone. Participants can say whether they want to be contacted about our service, to talk to the auditor or they can opt out and say they do not want to speak to the auditor about our services.

I would like to speak to the auditor

I would **NOT** like to speak to the auditor

## Declaration and Agreement Signature



- I declare that I am eligible, have the right, authority, and capacity to enter into this Service Agreement
- I have read and understood this Service Agreement

Participant or representative name		Date	
Participant or representative signature			

## Annexure - Schedule of Supports

EPSS will directly claim establishment and monthly fees from the NDIA.

The "description of support" and "price limit" below will be varied from time to time in line with changes to the NDIS Pricing Arrangements and Price Limits.

Plan Management - Establishment and Monthly Fee and Capacity Building Fees		
Support Item	Description of Support	Price Limit
Plan Management - Financial Administration (14_034_0127_8_3)	<b>Plan Management Monthly Fee</b> A monthly fee for the ongoing maintenance of the financial management arrangements for managing of funding of supports.	\$104.45* per month Remote \$146.23* per month Very Remote \$156.67* per month
Plan Management and Financial Capacity Building - Set Up Costs (14_033_0127_8_3)	<b>Plan Management Establishment Fee</b> An establishment fee for setting up of the financial management arrangements for managing of funding of supports, as set in the plan, for the duration of the plan as specified by the NDIA.	\$232.35 Remote \$325.29* Very Remote \$348.54*

\*Fees may differ depending on what is included in your plan and/or your location