

Getting Started with EPSS

You're in good hands

We'll take care of the financial side of your plan — so you can focus on your supports.

Now that you're set up, this guide covers how your plan management works and what to expect.

If you have questions at any point, get in touch — we'll explain where things are up to and what happens next.

What plan management means for you

EPSS handles the financial administration of your NDIS plan.

This means:

- Your providers send invoices directly to EPSS — you don't need to manage this yourself
- Invoices are reviewed and submitted to the NDIS on your behalf
- Providers are paid once funds are released by the NDIS
- You can see your funding balances and submitted invoices at any time through the dashboard
- You'll receive monthly statements so you always know where your funding stands

You don't need to manage claims, chase payments, or navigate the NDIS portal. That's what we're here for.

Your invoice preference

You choose how invoices are handled — and your preference was confirmed during setup.

- **Automatic processing** — invoices are processed as they are received, once requirements are met. No action needed from you.
- **Approve first** — EPSS checks with you before submitting each invoice. This gives you more oversight but may affect processing timeframes.

You can change your preference at any time by contacting us.

To keep things clear — plan management is specifically a financial service.

EPSS does not:

- Decide what can be funded or claimed — that is determined by the NDIS
- Implement your NDIS plan or coordinate your supports
- Prepare or amend provider invoices

You're all set. Here's what to expect.

Your funding information

You'll receive a registration link for the plan management dashboard shortly if you haven't already. From there you can check your plan-managed funding balances and submitted invoices at any time.

Each month you'll also receive a statement showing processed invoices and remaining funding balances.

A few things to keep in mind

- Supports need to be in line with your NDIS plan and NDIS requirements — if you're unsure whether something is covered, check before committing. Your Support Coordinator, Local Area Coordinator, or the NDIS directly are the right people to ask. The NDIS also publishes guidance on what can be funded at [ndis.gov.au](https://www.ndis.gov.au).
- Keep an eye on your funding balances through the dashboard or your monthly statements before taking on new supports — this helps avoid situations where funding runs short.
- Let us know if anything changes with your plan — including a new plan after a review, a plan suspension, or if you leave the NDIS. We need your current plan on file to keep processing invoices without interruption.

What can be funded or claimed is determined by the NDIS, not EPSS — so when in doubt, go to the source.

What happens next

- Your providers can send invoices directly to EPSS at invoices@essentialplan.com.au
- We'll review and process invoices promptly as they arrive
- You'll receive your dashboard registration link shortly if you haven't already
- Your first monthly statement will follow at the end of the month

For a full step-by-step walkthrough of the invoice and payment process, refer to the EPSS Plan Management Process guide included with this pack.

You don't need to do anything else — we'll take it from here.

More information

For detailed information on PACE endorsement, invoicing requirements, reimbursements, and more — including the full Plan Management Process guide — visit: essentialplan.com.au

Contact

Essential Plan Support Services

- Phone: 0474 329 544
- Email: admin@essentialplan.com.au
- Web: essentialplan.com.au

If something doesn't look right or you have a question, get in touch — we'll explain where things are up to and what happens next.

We're here from day one — don't hesitate to get in touch.