

EPSS New Provider Details Form



Registered NDIS Provider

Essential Plan Support Services

Use this form to give EPSS your business and bank account details so we can set you up as a provider and process invoices for the participants you support.

Important: EPSS cannot accept bank account details supplied only on an invoice or in the body of an email. We cannot set you up as a provider, or process any invoice, until this form has been returned and verification is complete.

Please print this form, complete it, sign it by hand, and return it as a scan or photo to invoices@essentialplan.com.au.

Please attach proof of your bank account ownership to the same email. Acceptable documents are a screenshot from your banking app, the top of a bank statement, a letter from your bank, or a deposit slip showing your business name and account details. Send proof as a PDF, JPG or PNG.

Business details

Legal entity name
(as registered with the ABR)

Trading / business name
(if different)

ABN

ACN (companies only)

Entity type (sole trader /
company / partnership / trust)

Business address (include
suburb, State and postcode)

About your trading / business name

If you trade under a name that isn't your own — or, for a company, not your registered company name — it must be registered as a business name with ASIC. "Jane Smith" needs no registration; "Jane Smith Support Services" does.

We match the name on your invoice against your ABN record, so a name that is neither your legal name nor a registered business name will hold up your invoice.

ASIC — Trading names are not registered business names (asic.gov.au)

Contact details

Contact name

Position / role

Phone number

Email address for invoices
and remittance

Website (if you have one)

NDIS details

Are you a registered NDIS provider? (Yes / No)	
NDIS registration number (if registered)	
Type of supports you deliver	
Participant name(s) you are supporting	

Bank account details for payment

Account Name			
BSB		Account number	
Bank name			

Give the account name exactly as your bank holds it, not an abbreviation or trading name — we check it with your bank before setting you up, and a mismatch will delay your first payment.

If the account is not in your business name — a family trust, say, or a related company — tell us why below.

Relationship to the participant

The NDIS generally does not fund family members, household members, or members of a participant's informal support network to deliver paid supports, unless the NDIA has given written approval.

Are you a family member, partner, or member of the same household as any participant you are supporting?	Yes ☐	No ☐
If yes, do you have written NDIA approval for this arrangement? (Attach a copy of the approval to your email).	Yes ☐	No ☐

What happens next — verification process

To protect participants' funds against payment fraud, EPSS verifies every new provider before a profile is created. We cannot set you up, or process any invoice, until all steps are complete.

1. Documentation

We review this completed form and the proof of bank account ownership you have attached, and check your ABN against the Australian Business Register.

2. Confirming your engagement

We confirm with the participant, their representative or their Support Coordinator that they have engaged you. We cannot set you up until we have that confirmation, so this step can take a few days depending on how quickly they reply.

3. Account name check

We add your account as a payee in our business banking, and our bank shows us the account name it holds for that BSB and account number. If it does not match the name you have given, we will contact you before going further.

4. Verbal verification

A member of our team will call you on the number you have given on this form to confirm your business and bank account details, and to read your BSB and account number back to you. This call must be completed before you can be set up.

5. Confirmation

Once verification is complete, we will confirm in writing that you have been set up.

Before you send your first invoice, it is worth reading what the NDIS expects of providers — the records you need to keep, and what an invoice must include:

NDIS — What are the record keeping requirements ([ndis.gov.au](https://www.ndis.gov.au))

How EPSS uses this information

EPSS collects the information on this form to verify your identity and bank account details, to set you up as a provider, and to process invoices for the participants you support. For sole traders this information is personal information under the *Privacy Act 1988*.

It is held securely and is not disclosed to anyone other than the participant or their representative, their Support Coordinator, and the NDIS Commission or NDIA where required by law. It is handled in accordance with the EPSS Privacy and Confidentiality Policy.

You can ask to see or correct the information EPSS holds about you at any time by emailing admin@essentialplan.com.au.

If you have a privacy concern, see essentialplan.com.au/privacy-policy



Declaration

By signing below, I declare that:

- The business and bank account details provided on this form are accurate and belong to the business named above
- I am authorised to provide these details on behalf of the business named above
- The information I have given about my relationship to the participant is true and complete
- I will notify EPSS using the Bank Detail Change Form before changing any bank account details
- I will notify EPSS if my ABN, business name or contact details change

Full Name		Position / role	
Signature		Date	

Contact

Questions about this form

Email invoices@essentialplan.com.au or call 0474 329 544.

More information for providers

How invoicing and payment work, what an invoice needs, and common causes of delay:

essentialplan.com.au/providers



Payment queries — email only

Once you are set up, please email payment queries rather than calling.

We cannot answer them on the phone — we need to check the participant's file and record the correspondence — so a call will end with us asking you to email. Going straight to email gets you an answer faster.

Email invoices@essentialplan.com.au with the participant name, invoice number, invoice amount and the date you sent it.