

EPSS Plan Management Process

This guide explains how plan management works with EPSS — so you know what to expect at each step and have something to refer back to when you need it.

Getting started

Before EPSS can begin processing invoices, the following need to be in place:

- A copy of your current NDIS plan
- A signed Service Agreement
- EPSS endorsed as My Provider and My Plan Manager — for PACE plans only

Once these are in place, EPSS can set up plan management and begin processing invoices. If any of these are missing or incomplete, this may delay the start of plan management.

You can get started before everything is in place — we'll confirm what's needed and guide you through the next steps.

For PACE plans — if endorsement hasn't been completed, contact the NDIS on **1800 800 110** or via the NDIS webchat. For the details you'll need to provide, refer to the Participants page at essentialplan.com.au or contact us directly.

How the process works

Step 1 — Providers send invoices to EPSS

Your providers send invoices directly to EPSS at invoices@essentialplan.com.au. You don't need to pass invoices on or follow things up.

Step 2 — Invoice review

Each invoice is reviewed against your NDIS plan and NDIS requirements before being submitted to the NDIS. Invoices must be complete, correct, and aligned with your plan to be processed.

If you have chosen the approve-first option, EPSS will check with you before submitting the invoice.

Step 3 — Submission to the NDIS

Once the invoice meets requirements — and your approval has been received if applicable — the claim is submitted to the NDIS.

Step 4 — Payment is made

Once the claim is submitted, the NDIS processes it and releases funds. This typically takes 2–3 business days but can take up to 10 business days — this stage is outside EPSS's control.

Once funds are released by the NDIS, EPSS makes payment to your provider within 1–2 business days. If you have submitted a reimbursement request, payment is made to you within 1–2 business days of funds being released by the NDIS.

Payment follows once funds are released by the NDIS — not at the point an invoice is received or submitted.



Step 5 — You stay informed

EPSS provides:

Monthly statements showing processed invoices and remaining funding balances

Access to your funding balances and submitted invoices at any time through the plan management dashboard. A registration link will be provided once you are set up.

Funding balances reflect processed claims. They may not include supports that have been delivered but not yet invoiced.



Your invoice preference

You choose how invoices are handled — and your preference is recorded and applied from the start.



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 EPSS.



Reimbursements

If you have paid for an NDIS support out of pocket, you may be able to request reimbursement. Reimbursement claims are processed in the same way as provider invoices.

You will need to provide a receipt and proof of payment for each item claimed.

Complete the reimbursement form at essentialplan.com.au



A few things to keep in mind:

- Make sure supports are in line with your NDIS plan and NDIS requirements before using them — if you're unsure, check with your Support Coordinator, Local Area Coordinator, or the NDIS directly before committing.
- Keep an eye on your funding balances through the dashboard or your monthly statements — this helps avoid invoices being unable to be processed due to insufficient funding.
- Let EPSS know as soon as possible if anything changes with your plan — including a new plan issued following a review, a plan suspension, or if you exit the NDIS. We need your current plan on file to keep processing invoices without interruption.

If you are unsure about a support, refer to NDIS guidance — Supports funded by the NDIS (ndis.gov.au/understanding/supports-funded-ndis) and the Plan Implementation Directory (ndis.gov.au/participants/plan-implementation-directory) — or speak with your Support Coordinator, Local Area Coordinator, or the NDIS directly.

EPSS does not decide what can be funded or claimed — those decisions are made by the NDIS.



Important information

The following covers key requirements and responsibilities to be aware of when using plan management with EPSS.

For invoices to be processed, the following must be in place:

- A valid invoice with all required information
- Your current NDIS plan on file with EPSS
- Sufficient funding available

Providers and eligibility:

- You can use both registered and unregistered providers — they must have a valid ABN and meet NDIS requirements
- EPSS cannot confirm whether a specific provider or support is claimable — that decision sits with the NDIS

Contact

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