

Plan Management Service Provider Instructions

This pertains to a mutual customer, a participant in the National Disability Insurance Scheme.

Specialised Plan Management acts as Plan Manager for the above customer. This means that we will facilitate the payment of invoices on behalf of the participant.

The purpose of this letter is to provide you with the correct information to process your invoice, as well as to make you aware of the process you need to follow to ensure that you are paid promptly for the services you have provided.

The NDIA have clear rules outlining how an invoice should be presented whether your organisation is an unregistered business or NDIS registered business.

Firstly, it is recommended that a service agreement is completed between the NDIS participant, and/or representative to ensure both parties are clear on:

- what supports and services the provider has agreed to provide
- What the prices of those supports and services.
- How, when and when and where the supports and services are to be provided
- An agreement can be in the form of a simple quote, with statements and signed by the participant. A quote signed is sufficient to outline the agreement between the two parties.
- Provide a copy of this agreement to your Plan Manager so they can keep a check on invoices being received and ensure budgets are being maintained.

Secondly, once services have been delivered and /or products supplied, please send invoice to **payments@specialisedplanmanagement.com.au** with the following details:

1. Business Name, business contact details including email address and your ABN is compulsory. If a valid ABN is not provided, the invoice will not be accepted for payment.
2. The Invoice needs to be addressed to the NDIS participant. If the NDIS Participant name is not listed on the invoice, the invoice will not be processed for payment.
3. The date of service needs to be listed on each line of support.
4. A description of service to be provided and/or NDIS line item. If unsure, please contact the SPM team and we can assist, or you can access the NDIS price guide on the NDIS website: www.ndis.gov.au/providers/price-guides-and-pricing
5. Quantity, whether this is measured in hours or units, a qty needs to be included.
6. The Agreed Unit rate and/or NDIS price as shown on the NDIS price guide for that line item.
7. Amount per line item of support
8. Total of Invoice, please note: Most NDIS Items are GST exempt. Please see note below.
9. Bank Account details for EFT payment and Email address to send you the Remittance Advice (confirmation of payment)

Please note most NDIS services are GST free. Many, but not all, NDIA supports provided to NDIS participants are GST-free. Further information about the NDIS and GST can be accessed on the [Australian Taxation Office website](#). Providers should seek independent legal or financial advice if they require assistance with tax law compliance. Please note, If GST is applicable to a support, the **price limit is inclusive of GST.**

Please refer to the attached Fact Sheet #5 – GST and the NDIS

Lastly, Specialised Plan Management will liaise with the customer to ensure that invoice is correct and approved for payment. Specialised Plan Management completes two payment runs per week, and generally, this means all invoices are processed and paid within 3 -5 business days.

If you have any queries regarding the above process, please direct your queries to the SPM office on **3317 8344** or send an email to payments@specialisedplanmanagement.com.au.

Example of a simple Tax invoice. Please contact the Team if you would like a template already drafted.

Tax Invoice

Business Name

Business Address

Phone:

Email:

ABN:

Date:

Invoice No:

INVOICE TO: *This should be the NDIS participant - not the family member or Support Coordinitor*

NDIS Number: (If Known)

Address: (If Known)

Date	Item Description	Line Item (not compulsory)	Qty	Unit Rate	Amount
01.06.2021	Home Maintenance	01_019_0120_1_1	1.5	\$49.30	\$73.95
08.06.2021	Assistance With Self-Care Activities - Standard - Saturday	01_013_0107_1_1	2	\$77.81	\$155.62
				Subtotal	\$229.57
				GST *	\$0.00
				Total Due	\$229.57

Payment Terms & Conditions

Account Name:

BSB:

Account

number:

Thank you