

## PLAN MANAGEMENT PROVIDER INFORMATION

















We look forward to working with you and processing your invoices for payment quickly and efficiently. In order for this to be a smooth process please ensure you email all invoices to [planmanager@lotusassist.com.au](mailto:planmanager@lotusassist.com.au)

### What to include in your invoice?

The NDIS has very specific requirements around invoicing and what a plan manager requires prior to processing an invoice for payment. To ensure there are no delays with your payment please include all of the following:

-  All invoice file types are preferred to be in PDF

As a minimum, invoices should include:

-  Company Name (or name if sole trader) Address
-  Phone Number
-  ABN Number
-  Invoice Date
-  Invoice Number (this needs to be Unique. If you use the standard INV-0100 then maybe add initials or an acronym to make it unique INV-0100-PB)
-  Participant Name and Details
-  Participant NDIS Number (if you have it)
-  Line Item Number
-  Item Description – Date of service **MUST** be included
-  Quantity and Hourly Rate - amount and quantity claimed for each unit of the support provided
  -  for example, \$51.09 each x 2 units
-  Travel time, km travelled, non-face to face and reporting time must be stated separately per line
-  Gross Amount
-  Subtotal, GST (if needed, most services are GST free), Total Amount
-  Bank Account Details - It is important that you also include the invoice payment details (BSB and account numbers) in the invoice claim.
-  Email address for remittances

**PLEASE NOTE: The participant MUST be the direct recipient of the provided service.**

See sample below

<p><b>1</b> [YOUR LOGO] Your Company Name</p> <p><b>2</b> 680 George Street 2000 Sydney NSW Australia Ph 02 9000 1234 Fax 02 9000 1235</p> <p><b>3</b> <a href="https://www.yoursite.com.au/">https://www.yoursite.com.au/</a> ABN 12 345 678 901</p>	<p><b>5</b></p> <p><b>6</b> <b>Bill To</b> Plan Manager PO BOX 123 Sydney NSW 2000 Australia</p>	<p><b>7</b> <b>Customer</b> John Snow 100 Winter Street Winterfell NSW 2100 Australia</p> <p><b>8</b> <b>NDIS Customer ID</b> 123456789</p>	<p><b>4</b> <b>Tax Invoice</b></p> <p>Page 1 Date 12/03/2020 Tax Invoice # INV123456 Account # CUS12345 Terms NETT 14 Days Due Date 12/04/2020 PO #</p>
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<b>9</b> <b>Item</b>	<b>10</b> <b>Description</b>	<b>11</b> <b>Qty</b>	<b>12</b> <b>Units</b>	<b>13</b> <b>Rate</b>	<b>14</b> <b>Gross Amt</b>
09_009_0117_6_3	Skills Development In A Group Date/Time 10/03/2020 09:00:00	4	Hrs	\$45.00	\$180.00
13_030_0102_4_3	Transition Through School And To Further Education Date/Time 10/03/2020 14:00:00	2	Hrs	\$45.00	\$90.00
11_024_0117_7_3	Individual Social Skills Development Date/Time 10/03/2020 16:00:00	1.25	Hrs	\$45.00	\$56.25
<b>Subtotal</b>					\$326.25
<b>GST</b>					\$0.00
<b>Total</b>					\$326.25
<b>14</b> <b>Amount Due</b>					\$326.25

Payment Options Below  
[\[Enter Payment Options\]](#)

For pricing information, line item names, descriptions and limits please refer to the NDIS price guide, this can be found at <https://www.ndis.gov.au/providers/pricing-arrangements>

## Should a Service Agreement be in place?

The simple answer is YES!

### What is a service agreement?

A service agreement is a written contract between you and a participant. It contains all the important information about the support you'll be providing to the participant, including how much you'll charge, when the service will be delivered, and any terms and conditions, including your cancellation policy.

### Why should you use service agreements?

While you're not required to set up service agreements, we highly recommend it. Here are some of the reasons why...

**Budgeting:** service agreements can help participants, support coordinators and plan managers manage NDIS plans budgets, as they show the full amount that a provider will charge for their services. This means the funds you require for your services over the agreed period of time can be quarantined and/or allocated to you.

**Managing expectations:** service agreements are a great way for participants to know exactly what to expect from a service provider. By listing all the important information about cancellation policies and other terms and conditions, you can make sure the participant understands and so they don't receive any surprise charges etc.

**Protection:** if you ever end up in a dispute with a participant, having a service agreement in place can protect you. Because your service agreement is a written record of exactly how many hours of support were agreed to be delivered and at what price, you can refer back to it.

### How do I set up a service agreement?

Setting up a service agreement is a simple process. As the provider you will fill out the template, entering all the details about the service you'll be delivering to the participant. When you've finished, you'll send the completed service agreement to the participant for approval. Once it has been reviewed and signed by the participant you now have a service agreement in place!

If you don't have a service agreement template, you can find one here

<https://www.brevity.com.au/blog/ndis-service-agreement-template/>

### What should I do with my service agreement?

Once you set up a service agreement, keep a copy for your records. You may need to refer to it in the future, so keep it somewhere safe but also where you can find it easily if you need it.

*It's important for you or the participant to send us a copy of your service agreements. Not only will we keep them on file for you, we can also use them to set aside funding to help you track spending more accurately.*

### Payment Guarantee

When you send us a signed service agreement, we'll set aside the funds needed to pay for your service. This means you don't have to worry about the plan running out of funds to be able to pay your invoices. To ensure these funds are allocated please send signed service agreements to [planmanager@lotusassist.com.au](mailto:planmanager@lotusassist.com.au)

We are here to work with you and are happy to answer any questions you may have. Please don't hesitate to contact us, details are below.

#### LotUs Assist Pty Ltd

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