



## 2022 – 2023 Provider Handbook

# Who are we?

Peak Plan Management is a team of skilled and qualified accountants and personal plan managers working for participants to simplify the administration and payments associated with their NDIS plans.

Participants can use both registered and unregistered providers to support them. An unregistered provider who provides supports to an NDIS participant carries the same invoicing responsibilities that are expected of a registered provider.

*Please see the appendix for further compliance related information.*

## NDIS Provider Invoice Tips & Tricks

When preparing invoices there are certain items that are required on an invoice in order for it to be paid.

This forms part of our own internal audit function and NDIS requirements.

Without these items we may not be able to pay your invoice.

At the minimum, an invoice intended to be paid with NDIS funding should contain the following information to ensure processing can be performed efficiently:

- Your business name and ABN (also include contact details and bank details for payment)
- Email and phone number for remittance advice
- The participant's name and NDIS number if known
- An invoice number
- An invoice date (ensure the invoice date falls after all service date(s); no forward-dated services can be paid)

For each line item, display:

- Service date(s)
- Relevant NDIS Item code  
Refer to the NDIS price guide, found on the NDIS website: <https://www.ndis.gov.au/providers>
- The duration of service(s)  
(e.g. Hours of a delivered service or travel time taken by a support worker, or the quantity of items provided (e.g. kilometers of provider travel or the quantity of a particular consumable)
- Unit price  
(e.g. \$/hour, \$ per km, or \$ per item)
- GST (if applicable)
- The amount for each line item
- The invoice total

An example invoice is located within the Appendix of this document along with a list of the most commonly used codes.

For more information regarding compliance, please refer to the appendix.

## Getting an Invoice Paid

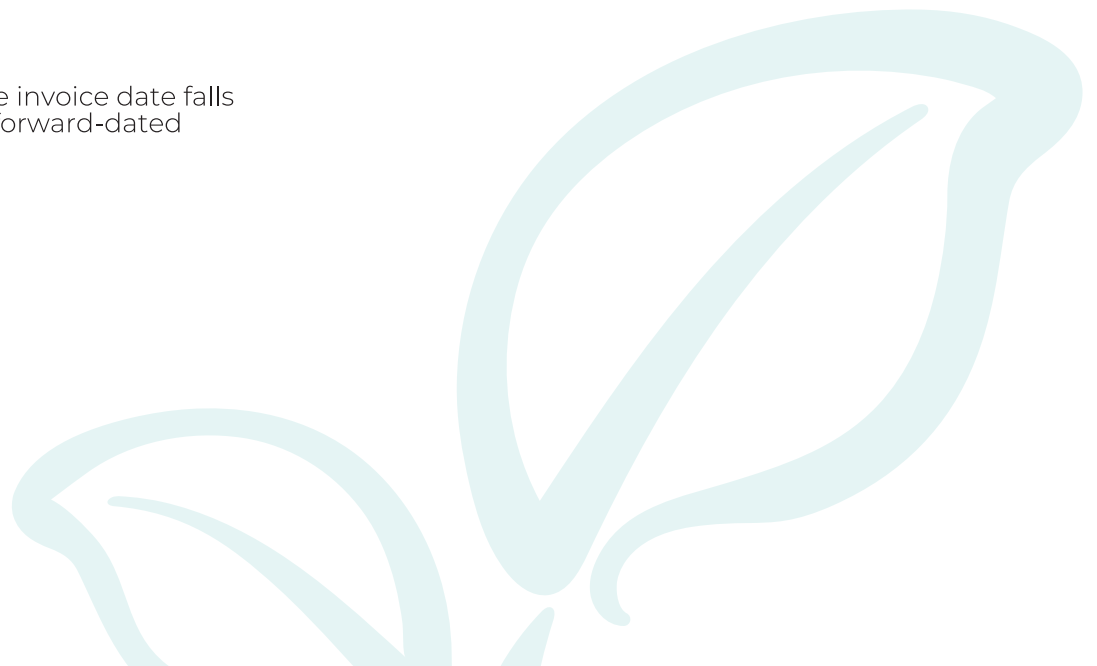
Invoices can be sent to Peak Plan Management via the following methods:

Email:  
[accounts@peakplan.com.au](mailto:accounts@peakplan.com.au)

Post:  
PO Box 1277, Bakery Hill VIC 3354

Fax:  
03 5337 6689

You must have approval from the participant prior to sending your invoices to us for payment.



## Processing Times

We pride ourselves on efficient payment times and will process your invoice within 5 business days on average.

However, there are some factors that may affect processing times.

If you do not receive payment within 5 business days, please phone or email us and we will be happy to follow up the payment for you.

## ABN - Important Information

The NDIS announced that ABN's are mandatory for Plan Managers when submitting payment requests.

If no ABN is supplied to us, we cannot pay the invoice under NDIS policy unless the provider has submitted the ATO's "Statement by a Supplier" form to Peak Plan Management.

The form can be located here:  
[www.ato.gov.au/Forms/Statement-by-a-supplier-not-quoting-an-ABN](http://www.ato.gov.au/Forms/Statement-by-a-supplier-not-quoting-an-ABN)

## GST

There are some special rules in regards to GST and the NDIS. We have attached some basic information from the ATO in the appendix below.

In the first instance, you should check with your accountant and perhaps if they are unfamiliar with the NDIS, to bring to their attention the information outlined within the appendix.

## Service Agreements

Service agreements are considered best practice and can define the service provision between yourself and the participant. Please ensure you send through your completed service agreements.

For our purpose we require a schedule of support to assist in the budgeting process. A schedule of support will increase the chance that you will receive payment and that there are adequate funds available to pay your invoice. If there are insufficient funds available, you may not receive payment.

We have attached a copy of the Request to allocate funds form within your welcome email. This can also be completed on our website under service agreements. You can see some examples of a schedule of support within the appendix of this document.

An NDIS support calculator can be located here:  
<https://www.supportcalculator.com.au>

Copies of Service Agreements should be emailed to [sa@peakplan.com.au](mailto:sa@peakplan.com.au)





## Example Invoice

Don't have accounting software? Download a copy of an invoice template in Word.

It can be found on our website under provider help.  
[www.peakplanmanagement.com.au/provider-help.html](http://www.peakplanmanagement.com.au/provider-help.html)

**TAX INVOICE**

Clear details about the participant  
Adam Johnson  
123 Sturt Street  
Ballarat VIC 3350

Item Code is provided to ensure correct funding is claimed

The Participant's NDIS Number

Invoice number is provided to make sure we have something to reference

Invoice Date  
18 Mar 2019

Account Number  
123456789

Invoice Number  
INV-0002

Reference  
XYZ Plan Management

ABN  
12 345 678 910

ABC Pty Ltd  
20 Main Rd  
Ballarat VIC  
3350

Tel: 0412345678

Email: [accounts@abc.com.au](mailto:accounts@abc.com.au)

Quantity is provided to ensure we know how many hours or units were provided

Unit price for each unit or hour. We can only pay up to the NDIS price cap.

Item AUD	Description	Quantity	Unit Price	GST	Amount
01_010_01 07_1_1	Assistance with, or supervision of, personal tasks of daily living where overnight support is needed, but the care giver can sleep when not required to provide support	1.00	204.81	GST Free	204.81
04_187_01 04_6_1	Assist participant to undertake and/or develop skills to maintain their home environment where the participant owns their own home and/or has sole or substantial responsibility for its maintenance. Includes assisting participant to do basic house and yard work - Saturday 12 Mar 2019	1.00	72.62	GST Free	72.62
Subtotal					277.43
<b>TOTAL AUD</b>					<b>277.43</b>

Due Date: 1 Apr 2019

Payment Details:  
ABC Pty Ltd  
BSB: 012456 Account No: 123456789

Include total overall amount for invoice.

Payment details are provided so we can pay the service provider

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PAYMENT ADVICE

To: ABC Pty Ltd  
20 Main Rd  
Ballarat VIC 3350  
Tel: 0412345678  
Email: [accounts@abc.com.au](mailto:accounts@abc.com.au)

Customer  
Account Number  
Invoice Number  
Amount Due  
Due Date  
Amount Enclosed

Adam Johnson  
123456789  
INV-0002  
277.43  
1 Apr 2019

Enter the amount you are paying above

Email address is provided so we can send remittance advices.

For more information regarding Peak Plan Management or assistance with invoicing requirements, please call us on 1300 73 23 24 and ask to speak with a member of our skilled Accounts Team!

## Most commonly used codes

01\_019\_0120\_1\_1

House And/or Yard Maintenance

01\_011\_0107\_1\_1

Assistance With Self-Care Activities - Standard - Weekday Daytime

01\_020\_0120\_1\_1

House Cleaning And Other Household Activities

04\_104\_0125\_6\_1

Access Community Social And Rec Activities - Weekday Daytime

15\_054\_0128\_1\_3

Assessment Recommendation Therapy And/or Training (Incl. AT) -Psychology

15\_055\_0128\_1\_3

Assessment Recommendation Therapy And/or Training (Incl. AT) -Physiotherapy

The Support Catalogue can be accessed here:  
[www.ndis.gov.au/providers/pricing-arrangements](http://www.ndis.gov.au/providers/pricing-arrangements)

## Useful Links

How to get paid:  
[www.ndis.gov.au/providers/working-provider/getting-paid](http://www.ndis.gov.au/providers/working-provider/getting-paid)

Price Guide:  
<https://www.ndis.gov.au/providers/pricing-arrangements>

Fraud Control/Provider Compliance:  
<https://www.ndis.gov.au/providers/provider-compliance>  
<https://www.ndis.gov.au/about-us/fraud-and-non-compliance/fraud-strategy-statement>

NDIS Commission (providers responsibilities)  
<https://www.ndiscommission.gov.au/providers>

# Schedule of Support Examples

NDIS Support Item Name	NDIS Support Item Ref No.	No. of Units	Rate per Unit	Start Date	End Date	Total Amount
Example: Group Community Activities: Higher intensity needs 1:3 Ratio	04_124_0104_6_1	1260 hrs	\$18.98	1.11.18	31.10.19	\$23,914.80

Participant or Nominee Signature

Date

Purpose	Outcome Domains	Support Categories	Examples of Supports or Services
There are 3 Purpose areas	There are 8 Domains in total	There are 15 Categories in total	(This is not an exhaustive list – please see more examples in NDIS Price Guide)
<b>CORE</b> Support for undertaking and completing everyday activities and tasks	Daily Living	1. Assistance with Daily Life	Help with household tasks, personal care and domestic help. Food preparation and delivery. Tasks of everyday life. Respite care.
	Daily Living	2. Transport	Transport to access the community for educational, recreational and vocational purposes. Can be paid fortnightly to your bank account.
	Social and Community Participation	3. Consumables	Budget for everyday items. Includes low cost items, some therapy based aids, interpreting, continence, nutrition products.
	Daily Living	4. Assistance with Social and Community Participation	Classes, sessions, camps, holiday activities, peer support, individual skill development.
<b>CAPITAL</b> Assistive technology, home or vehicle modifications. Includes Specialist Disability Accommodation	Daily Living	5. Assistive Technology	Products for household tasks, personal care, safety, recreation, mobility. Vehicle modifications to enable a person to drive or travel as a passenger.
	Home	6. Home Modifications and Specialist Disability Accommodation (SDA)	Elevator, rails, kitchen or bathroom modifications, ramps, project building manager, certification.
<b>CAPACITY BUILDING</b> Build independence and skills.	Choice and Control	7. Support Coordination	There are 3 main types of Coordination to help a person connect with and maintain supports and resolve issues - Support Connection, Coordination of Supports and Specialist Coordination.
	Home	8. Improved Living Arrangements	Group homes, residential homes, accommodation support package, outreach. Help with tenancy obligations, skill development and training.
	Social and Community Participation	9. Increased Social and Community Participation	Community Access, Community participation, Recreation and fitness programs, holiday care, Out of School Hours Care (OOSH), weekend programs, flexible or centre based respite.
	Work	10. Finding and Keeping a Job	Transition to employment. Work skills, preparation, individual employment support, ADEs.
	Relationships	11. Improved Relationships	Behaviour intervention, Behaviour Management Plan. Strategies, and social skills development.
	Health and Wellbeing	12. Improved Health and Wellbeing	Exercise physiology, personal training, dietician consultation and plan development.
	Lifelong Learning	13. Improved Learning	Transition through school and to further education.
	Choice and Control	14. Improved Life Choices	Plan Management. Administration and record keeping. Payment of bills. People can choose Plan Management and have access to registered and unregistered providers.
	Daily Living	15. Improved Daily Living Skills	Therapy (e.g. Psychology, Physiotherapy, Speech Pathology, Occupational Therapy). Programs of support, strategies, reports and assistance with quotes for assistive technology or home modifications. Useful for preparation of reports for plan reviews.



## NDIS Code of Conduct

The NDIS Code of Conduct applies to any provider or individual intending on delivering services to an NDIS participant, including that they:

- Act with respect for individual rights to freedom of expression, self-determination, and decision making in accordance with relevant laws and conventions
- Respect the privacy of people with disability
- Provide supports and services in a safe and competent manner with care and skill
- Act with integrity, honesty, and transparency
- Promptly take steps to raise and act on concerns about matters that might have an impact on the quality and safety of supports provided to people with disability
- Take all reasonable steps to prevent and respond to all forms of violence, exploitation, neglect, and abuse of people with disability
- Take all reasonable steps to prevent and respond to sexual misconduct.

The NDIS Commission has further information about the NDIS Code of Conduct available at [www.ndiscommission.gov.au/providers/ndis-code-conduct](http://www.ndiscommission.gov.au/providers/ndis-code-conduct)

## NDIS Quality and Safety Commission

The Commission is responsible for making sure services are safe for NDIS participants. Unregistered providers are not subject to audit or other procedures faced by registered providers, but they are still required to ensure they have at minimum, basic processes in place to maintain a quality and safe service. Worker Screening Check, (depending on the type of services you provide) and a Complaints Process in place for responding to, and management of, complaints in relation to the quality or safety of your goods and services, are best practice.

## GST Requirements

A supply to a NDIS participant is GST-free if all of the following requirements are met:

- The NDIS participant has a NDIS plan in effect
- The supply is of reasonable and necessary supports that are specified in the statement of supports in the participant's NDIS plan
- There is a written agreement between you and the NDIS participant (or another person)
- It is a supply covered by one of the tables in the A New Tax System (Goods and Services Tax) (GST free Supply—National Disability Insurance Scheme Supports) Determination 2021<sup>External Link</sup> (NDIS Determination)

For more information around NDIS specific GST please visit:

National Disability Insurance Scheme | Australian Taxation Office ([ato.gov.au](http://ato.gov.au))

## Transport

The Core Transport category enables participants to access disability supports outside their home and to achieve the goals set in their plan. This support item is delivered to individual participants and should not be billed against support worker travel.

Activity based transport however, is different. Providers of supports in the Assistance with Social, Economic and Community Participation support category can, at the request of the participant, transport the participant to or from a community participation support. In these cases the provider is entitled to invoice against the participant's plan for the time spent providing the transport support. The provider is also entitled to invoice for any non-labor costs associated with transporting the participant.

For more information regarding Transport and Travel, please visit [www.ndis.gov.au/providers/pricing-arrangements](http://www.ndis.gov.au/providers/pricing-arrangements)

Page 23 has valuable information relating to claiming for Activity Based Transport.



## Contact Us

1300 73 23 24

[info@peakplanmanagement.com.au](mailto:info@peakplanmanagement.com.au)

PO Box 1277,  
Bakery Hill VIC 3354

[www.peakplanmanagement.com.au](http://www.peakplanmanagement.com.au)



Peak Plan Management respects and acknowledges the Traditional Custodians of the Land, of Elders past, present and emerging, on which our business is conducted.



We value, foster and celebrate diverse communities. We are committed to ensuring that people from all walks of life feel welcome and valued within our organisation. We endeavor to acknowledge our own unconscious bias, in order to listen to and learn from those who live a minority experience.

Registered  
NDIS Provider

