

# How to claim from my plan

You have three options for who manages the funding in your plan.

1. Self-managed: [you, or your plan nominee or child representative, manage the funding](#) and pay your providers.
2. Agency-managed: we manage the funding and pay your providers.
3. Using a [registered plan manager](#) to manage the funding and pay your providers.

You can also choose a mix of these types of plan management. For example, you might like to manage some of the funding yourself, and we'll manage the rest.

Learn more about [how we decide how funding is managed](#).

When we say claim, we mean asking for payment from the funding in your plan after you receive a support. Who claims and how claims are made depends on how your NDIS funding is managed.

Before you make a claim, there are some things that need to be checked. This is to make sure the claim is valid and payment can be processed.

This includes checking:

- you received the supports being claimed
- you and your provider agreed on a price and the type of support
- your plan includes funding for the support
- your plan has enough funding for the amount being claimed
- you received the supports within the dates of your plan

- you have the Australian Business Number (ABN) of the provider delivering the supports, unless the provider has evidence they are exempt from quoting an ABN.

You, or the person managing your plan needs to make sure there's enough funds. Whoever manages your plan will need to make sure you're getting the support you need. They also need to check you're not spending your funds too fast and make sure claim details are correct.

We also check the supports you're claiming are funded in your plan and there's enough funds.

## How you pay providers

How you pay providers depends on how funding in your NDIS plan is managed:

- Self-managed
- Agency-managed
- Using a Registered Plan Manager

## Self-managed funding

We'll explain:

- Who claims for your supports
- What you need to check before you make a claim
- How you claim supports
- What records you need to keep
- Your rights and responsibilities

Find out more about self-management in our [Guide to Self-Management](#) ([Easy Read version](#)) on the [Self-Management](#) page on our website.

### Who claims for your supports

You will pay providers, after they provide you with the support and invoice you.

When we say 'you' we mean you, or the person you have asked us to appoint to self-manage for you. This might be your plan nominee or your child representative.

Check out [Guardians and nominees explained](#) on our website.

There are two options:

- Make a claim and then pay your provider after the money has been paid to your bank account.
- Pay your provider with your own money and then make a claim to be reimbursed.

## What you need to check before you make a claim

You need **evidence** you received the support, who provided the support and on what dates. You need this for all supports, including your local handyman attaching handrails in your bathroom, or a worker you directly employ.

Evidence can be either:

- ☐ a receipt or tax invoice from your provider
- ☐ a bank statement or payroll record for any worker you employ.

You should keep any type of evidence that confirms the details in your claim. We may contact you to discuss the evidence you have to support your claim.

Use the evidence to check the **details match** your claim. You need to check:

- ☐ support dates (start and end) **Tip:** use the dates you received the support, not the date you make the claim. This will be on the receipt or invoice
- ☐ hours/quantity
- ☐ unit price
- ☐ total amount.

Check your claim is from the **correct support category**. You only need to tell us the support category you are claiming from, not the individual support item. Find out more about support categories in our [Guide to Self-Management](#) ([Easy Read version](#)) on the [Self-Management](#) page of our website

Make sure there are **enough funds in your plan** for the amount you're claiming.

### Example:

Michael needs help looking after his yard because of his disability. Michael self manages his funding for daily supports and he chooses both NDIS registered and unregistered providers. This includes paying a lawn mowing service from his plan to mow his grass. Michael's other supports are Agency-managed.

The handrail in Michael's bathroom is loose and needs fixing. He checks his plan and works out how much funding he has available.

Michael contacts a handyman that might be able to do the work. They agree what work will be done and how much it will cost. Michael also checks the handyman will give him a tax invoice and asks for a written quote.

When the work is done the handyman gives Michael a tax invoice. Michael uses the my NDIS app to make a claim from his plan. He knows he can also use the myplace portal or fill in a MyPlan purchase payment request form and send it to us. Michael checks his bank account. He receives payment within 2 business days and pays the handyman. The handyman sends Michael a receipt for the payment. Michael keeps the tax invoice and the receipt. He knows we might ask for them later.

## How you claim supports

You will use the [myplace portal](#) or the [my NDIS app](#) to make a claim.

If you can't make a claim using the myplace portal or the my NDIS app, you'll need to use the [MyPlan purchase payment request form \(DOCX. 85KB\)](#). **Tip:** you, your payment nominee or child representative must sign this form.

It is important you claim after the support is provided. You will need evidence you received the support.

Use the information on the invoice or receipt to make your claim. Make sure your evidence matches the details on your claim. This will help you claim the correct amount and type of support.

After you make a claim, we generally make a payment to your nominated bank account within 2 business days. For example, if you make a claim on a Monday, it will usually be deposited into your bank account on Wednesday. It can take us longer to process your payment if you use the MyPlan purchase request form. Sometimes we might ask you for more information before we make the payment. In this case we'll contact you by your preferred method. When you get your payment you should pay your provider as soon as possible.

Check out [How to use the myplace portal](#) and [the my NDIS app](#).

## What records you need to keep

You need to keep any information you used to make your claim, such as invoices, receipts, payroll records, and bank statements. You need to keep them for 5 years.

For each claim you make, you need to have:

- the provider's name
- their Australian Business Number (ABN). If there is no ABN, you need to ask the provider for evidence they are exempt from quoting an ABN.
- the support dates
- a short description of the support provided
- the support category the support relates to
- the amount of support provided (hours/quantity)
- the support price (per hour/unit)
- the total amount paid.

We regularly do audits to make sure you've made the necessary checks and kept the information we've asked you to. When we do an audit we will ask you to give us the information you used to make a claim.

### Example:

Margaret is passionate about cooking and exercise. She would like a job in fitness or hospitality. Margaret's plan nominee Sally helps her manage her funding. Margaret and Sally decide to self-manage Margaret's funding to give the most flexibility and to employ people directly.

Margaret and Sally build a flexible team to best suit Margaret's needs. They employ a trainee chef Jonah, to help with basic nutrition and preparing meals. They also employ an exercise science student Melanie, who helps Margaret be active in her community and get work at the local sports centre.

Sally sets up a bank account for Margaret's claims. Margaret and Sally are employing staff, so they set up a roster and payroll system. This makes sure her staff are paid correctly for their time, the right tax is withheld, and staff receive correct benefits or entitlements. Margaret and Sally check the timesheets that staff submit each fortnight and use this information to claim employee payment amounts using the my NDIS app. When the money reaches their bank account within 2 business days, they pay their employees.

Margaret and Sally keep their payroll records up to date. They keep copies of all receipts for tax, insurance, and any other payments they need to make to meet their responsibilities as an employer. Margaret and Sally can use any savings in Margaret's plan to help with the cost of employing her support people or to pay for more supports to help her pursue her goals.

## Your rights and responsibilities

When you claim for your supports you need to make sure:

- supports relate to your disability
- you are only spending NDIS funds on supports which are described in your plan
- you manage the budget in your plan to make sure you have enough funds until your plan is due for reassessment. This means you need to consider how much you can spend on a weekly or monthly basis. This is so you have enough funds to pay for your supports for your entire plan period.
- you pay your providers promptly for the supports you agree for them to provide, once they have provided them
- you keep evidence of what you claim, for example, invoices, receipts, pay slips, bank statements
- you don't mislead anyone to gain financial or other benefits
- you tell us if your situation changes
- you give us information about your claims when we ask you
- the support is most appropriately funded through the NDIS. For example, you shouldn't claim from your plan if the support is more appropriately funded through other government services, like health or education systems.

You have the right to:

- choose who delivers your supports and agree how your supports are delivered
- not feel pressured to buy supports or use a provider you don't want or need
- negotiate how much you want to pay for your supports to get the most out of your plan funds
- pay for supports at a fair and reasonable rate. Check out the [NDIS pricing arrangements and price limits](#) to make sure you get value for money

- decide what personal information you give your providers
- know and ask questions about any conflict of interest your provider might have.

Find out more about your rights and responsibilities on the [Self-Management](#) page of our website.

## Agency-managed funding

We'll explain:

- [Who claims for your supports](#)
- [What your provider needs to check before they make a claim](#)
- [How your provider claims for your supports](#)
- [What records your provider needs to keep](#)

### Who claims for your supports

Only registered providers can make claims from your funding. They do this after they've provided the support. We generally don't allow prepayment for supports.

### What your provider needs to check before they make a claim

Before providing supports and making claims your provider will work with you to:

- agree on the price and type of supports they provide to you
- make a service agreement if you want one. We recommend you have a written service agreement
- make a service booking.

Your provider must have a **service booking**. Find out more about [Service Bookings on our website](#).

They need **evidence** you received the support, who provided the support, on what date and where.

They check their claim **details match** the evidence for the support you received, including:

- ☐ your name and NDIS number
- ☐ support dates (start and end)
- ☐ support item reference number

- ☐ support hours/quantity
- ☐ support item price
- ☐ total amount.

They check the claim is against the **correct support category** for the support they provide. You can learn more about [Support budgets in your plan](#) page on our website.

They also need to have a valid service booking to make sure there are enough funds in your plan for the amount they're claiming.

### **How your provider claims for your supports**

Registered providers use the [myplace provider portal](#) to make claims or other options available from the NDIA. Find out more about other options available on the [Connecting with NDIA systems](#) page on our website.

They should do this as soon as possible and within 90 days from the end of the service booking.

Your provider can use a bulk payment request in the myplace provider portal to make multiple claims together. For example, if you get support every week, your provider may make a claim at the end of the month for 4 weeks of support. Find out about bulk payment requests on the [Getting paid – making bulk payment requests page of our website](#).

You can check what your provider has claimed using the [myplace portal](#) or the [my NDIS app](#).

After your provider makes a valid claim, we make a payment to their bank account within 2 business days.

### **What records your provider needs to keep**

For each claim your provider needs to keep records showing:

- your name and NDIS number
- the support dates (start and end)
- the support type and item number from the [NDIS Pricing Arrangements and Price Limits](#)
- the amount of support provided (hours/quantity)
- the support price (per hour/unit)
- the total amount claimed.



Your providers must comply with the [NDIS Code of Conduct](#). They must make sure claims are complete, truthful and correct.

We do audits to make sure your providers make the necessary checks. We might ask your provider for the information they used to make the claim.

### **Example:**

Jacob wants to focus on being independent and prefers that the Agency manages his funding.

Jacob chooses his providers from a range of NDIS registered providers using the NDIS provider finder. Jacob's support coordinator also helps him to find registered providers that suit him.

Jacob talks to his providers about the supports he needs. Jacob and his providers agree how much funding Jacob needs for the supports he wants. They make a service agreement so Jacob knows what supports he will get and what happens if he needs to cancel a support. Jacob's providers know they need to create service bookings to claim from Jacob's plan.

Jacob knows his providers can't charge more than the NDIS pricing arrangements and price limits. Sometimes he and his providers agree to claim less than the NDIS price limit. This means Jacob can get good value for money for his supports.

Jacob's providers use the myplace provider portal to make claims. They keep records of the supports Jacob receives, who provided the support, the item number for the support, and when and where he received the support. We will manage Jacob's plan and pay his providers.

Jacob uses the myplace portal to check what claims his providers make from his plan. Jacob can also keep track of his budget on the portal. Jacob's support coordinator also helps him keep track of his plan.

## **Using a registered plan manager**

We'll explain:

- [Who claims for your supports](#)
- [What your registered plan manager needs to check before they make a claim](#)
- [How your registered plan manager claims for your supports](#)
- [What records your registered plan manager needs to keep](#)

Find out more about using a registered plan manager in our [NDIS Guide to Plan Management](#) ([Easy Read version](#)) on the [Plan management page](#) of our website.

## Who claims for your supports

A registered plan management provider claims from your funding. They'll pay your providers for you. Your registered plan manager can pay registered or unregistered providers from your funding. Your registered plan manager will reimburse you if you have paid for a support with your own money.

## What your registered plan manager needs to check before they make a claim

- The registered plan manager needs **evidence** you received the support, who provided the support and on what date. They need the same evidence to reimburse you, where you've paid for a support with your own money, or to pay your provider.

The evidence can be a receipt or tax invoice. It must have a **valid Australian Business Number**, unless the provider has evidence they are exempt from quoting an ABN.

- They check with you the **details match** the claim and the tax invoice/receipt. This includes:
  - ☐ support dates (start and end)
  - ☐ hours/quantity
  - ☐ unit price
  - ☐ total amount.
- They check the **support being claimed is included in your plan**.
- They check the claim is against the **correct support category**. You can learn more about [Support budgets in your plan](#) on our website.
- They also need to make sure there are enough funds in your plan for the amount they claim. They also need to consider how much is spent on a weekly or monthly basis. This is so you have enough funds for your entire plan period.

## How your registered plan manager claims supports

To make claims, your registered plan manager will either use the [myplace provider portal](#) or other options available from the NDIA. Find out more about this on the [Connecting with NDIA systems](#) page on our website.

They should make claims as soon as possible after receiving the valid tax invoice/receipt, and checking the claim is correct. Your registered plan manager should make claims within 90 days from the end of the service booking. Your registered plan manager will need to contact the NDIA if they want to make a claim more than 90 days from the end of the service booking. Find out about bulk payment requests on our [Getting Paid – Making bulk payment requests page of our website](#).

You can check what your registered plan manager has claimed using the [myplace portal](#) or the [my NDIS app](#).

After they make a valid claim, we make a payment to their bank account within 2 business days. They should then pay your provider or reimburse you.

## What records your registered plan manager needs to keep

Your registered plan manager needs to keep any information they used to make the claim, such as invoices and receipts. They need to keep them for 5 years. Your registered plan manager will not be able to claim supports for you if they do not have the evidence they need.

For each claim your plan manager needs to keep records showing:

- your name and NDIS number
- the provider's name
- their ABN, or evidence the provider is exempt from quoting an ABN
- the support date
- a short description of the support provided
- the support category the support relates to
- the amount of support provided (hours/quantity)
- the support price (per hour/unit)
- the total amount paid.

We regularly do audits to make sure your registered plan manager makes the necessary checks. When we do an audit we will ask your plan manager for the information they used to make the claim.

### Example:

Malech asks for a registered plan manager to manage his funding. Malech uses the NDIS provider finder to find a registered plan manager and talks to the registered plan manager about the services they offer. The registered plan manager explains part of their role is to help Malech understand how NDIS pricing arrangements and price limits work. They talk about the price limits for the supports Malech wants to claim.

Malech chooses the registered plan manager and gives them details of his plan. He tells them about the supports he gets, who he gets his supports from and how often. The registered plan manager allocates the funds for Malech's supports. They also check there are enough funds for the supports Malech would like.

The registered plan manager knows they need to set up service bookings for Malech's plan management fees before they can claim for Malech's other supports. Malech has capacity building choice and control funding in his plan for plan management supports. Find out more about [working as a provider on our website](#).

Malech asks his providers to send invoices directly to his registered plan manager. His registered plan manager makes sure the invoices have the provider's ABN, the support date, the amount of support, the support price and the total cost. Malech knows his registered plan manager is responsible for making claims and keeping the right records. His registered plan manager uses the myplace provider portal to make Malech's claims and receives payment in their bank account within 2 business days. The plan manager pays Malech's providers.

Malech checks the myplace portal every few weeks. He looks at his funding and the claims the registered plan manager has made from his plan. He knows his registered plan manager will let him know if he is spending his funds too fast.

Check out how to use the [NDIS provider finder](#) to find a registered plan manager.

### What if something's not right?

Sometimes things can go wrong, or you find something's not right. This can include things like not getting the support you agreed to or providers claiming more than you agreed to.

We understand most people try to do the right thing, but sometimes make mistakes. We want to help you to do the right thing with claims.

If you think your registered plan manager or provider has made a mistake with a claim, contact them as soon as you can.

If you don't feel okay talking to your registered plan manager or provider, talk to someone you trust. They may be able to support you to resolve your concern. If you can't resolve the issue you can contact us on 1800 800 110.

### **Who do I talk to if I make a mistake?**

If you make a mistake making a claim, you should talk to your local area coordinator, early childhood partner, NDIA planner, support coordinator or recovery coach as soon as you can. Or you can contact us on 1800 800 110.

We will work with you to explain what you need to do. We can help you get it right next time. We can also talk to you about capacity building supports to build your skills to manage your plan and make sure your claims are right. This might include follow up monitoring with you or your nominee.

If you or the person managing your plan deliberately does the wrong thing, we will take steps to protect your funding. For example, we may review who manages your plan.

### **What if I think someone is doing the wrong thing with NDIS funds?**

If you think someone might be doing the wrong thing or committing fraud, you should report it. Fraud might include:

- charging for supports you didn't get
- charging for more support than you get.

The best way to report suspected fraud is to call the NDIS Fraud Reporting Hotline on 1800 650 717.

You can find out more about [fraud](#) on our website.