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What the record keeping requirements are

As a provider, you need to keep complete and accurate records of NDIS supports delivered to participants.

Records include:

- invoices
- support logs
- rosters
- case notes
- service agreements.

It's your responsibility to make sure your claims for payment are complete, truthful and accurate.

Minimum identifying information

All record keeping should include the:

- participant’s name
- participant’s NDIS number
- date(s) the support was delivered
- amount and quantity or hours of the support delivered
- support type.

This is the minimum identifying information needed under our requirements.

Invoices

You need to give participants an invoice after delivering a support or service.

In addition to the minimum identifying information, invoices need to include your:

- business name
- ABN

- participant’s address (including postcode if it's for specialist disability accommodation)
- support item number listed in the NDIS support catalogue
- claim type
- total invoice amount
- GST component if applicable (most services are GST free)
- ABN of the third-party provider (for plan managers only).

Each invoice can only be for one participant. Invoices can include multiple NDIS supports.

Learn more from the ATO about creating invoices .

Support logs

Support logs keep track of individual NDIS supports delivered to a participant. Support logs need to be signed by either:

- the participant
- a child representative
- a nominee
- legal guardian.

Download the support log example:

- Support log example (PDF 367KB)
- Support log example (DOCX 96KB)

Rosters

Group rosters show the group activities a participant has engaged in.

In addition to the minimum identifying information, rosters need to include:

- details of the activity
- the names of participants and staff (the participant to staff ratio)
- a record that shows that a participant attended the activity as scheduled.

Download the group roster example:

- Group roster example (PDF 108KB)
- Group roster example (DOCX 107KB)

Case notes

Case notes outline the activities a participant has engaged in and how they relate to the:

- specific support item
- participant's goals.

Case notes may also include a participant's progress and plans for future sessions.

Service agreements

We recommend you make service agreements with participants. A service agreement is a signed agreement between you and a participant.

It outlines what NDIS supports and services you'll deliver and how you'll deliver them.

> **Tip: Service agreements are a requirement for specialist disability accommodation (SDA).**
>
> You need to make written service agreements with participants if you're providing SDA.

Records providers need to keep for each support category

The documentation by support type document shows a list of different support categories. These include assistance with daily life or improved daily living skills.

It also shows what type of record keeping is required for each category.

Download documentation by support type:

- Documentation by support type (PDF 294KB)
- Documentation by support type (DOCX 106KB)

What the record keeping requirements are for

We review claims regularly to make sure they are compliant

It's important you do the right thing. We can verify that claims for payment are compliant with your complete and accurate records.

The provider payment assurance program

The provider payment assurance program makes sure claims for payment are accurate. Failure to provide complete and accurate records during a review may result in funds having to be repaid to us.

Related information

How to do the right thing as a provider

4 Sep 2025

What is a service agreement

29 Aug 2025

What is the support catalogue

4 Sep 2025
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