



FREE GUIDE

A plan manager's guide to clean invoices and fewer disputes

90-day claims, record keeping, service agreements and clean invoices.

An invoice with the wrong item number. A shift nobody can account for. A participant on the phone, upset about a charge they never agreed to. This guide covers the 90-day claiming rule, record keeping, service agreements and what a clean invoice looks like, so fewer of those reach your desk.

The NDIS describes a plan manager's main role as financial administration: paying providers, checking claims meet NDIS requirements, tracking spending and keeping records. Finding providers isn't part of it. But when a provider's paperwork is wrong, it's your inbox that fills up, and your client's trust that takes the knock.

From 1 December 2026 the margin for error gets smaller. Here's what's changing, and what good looks like.

Claims, records and the plan manager panel

- **Record keeping.** From 27 August 2026, participants or their plan managers need to keep records for NDIS support payments for 3 years. The government says providers will need to keep records about payment and receipt of NDIS funds for 7 years, with a civil penalty for not keeping them. More detail on how to keep records is still to come.
- **90 days to claim, from 1 December 2026.** The time to claim for supports under a participant's plan drops from 2 years to 90 days after service delivery.
- **Supporting documents for larger claims.** The government says claims above a certain threshold will need supporting documentation.
- **No rollover, from 1 February 2027.** Unspent funds won't roll over when a plan is renewed. The NDIA's plan manager guidance already says funding must be spent within the current plan.
- **Provider enrolment, from 1 July 2027.** Most providers will need to enrol with the NDIA and nominate a validated bank account. It's separate from NDIS Commission registration.
- **A plan management panel, by 1 October 2027.** The NDIA will set up a panel of plan managers. Participants will need to use a plan manager on the panel, with a 6-month transition. Plan managers who want to join apply through a request for tender on AusTender.



The practical effect: from December, a provider who invoices three months late isn't just slow. Your client may not be able to claim that support at all.

What a clean NDIS invoice includes

The NDIA's record keeping guidance sets a minimum. Every invoice should show:

- the participant's name and NDIS number
- the date or dates the support was delivered
- the amount and quantity, or hours, of the support
- the support type and the support item number from the NDIS Support Catalogue
- the provider's business name and ABN
- the participant's address
- the claim type and the total invoice amount
- the GST component, if it applies (most services are GST free).

Each invoice can only be for one participant, though it can include several supports. Registered providers can't charge more than the NDIS price limits for NDIA-managed or plan-managed participants.

The agreement is what every invoice gets checked against

The NDIS says a written service agreement is only mandatory for specialist disability accommodation, but recommends one every time a participant starts with a new provider. It's what you, the participant and the provider all point to when a charge is questioned. A good one sets out:

- the supports, and how, when and where they'll be delivered
- the cost, including travel and any materials
- how the provider will be paid, which for your clients means invoices come to you
- the cancellation policy
- what either side can do if responsibilities aren't being met
- how to raise a concern, and who to contact if it isn't resolved
- how long it runs, when it's reviewed, how changes are made and how to end it.

If an invoice doesn't match the agreement, that's the conversation to have before you pay, not after.

Habits that stop disputes before they start

- Ask providers to invoice each service period, not in quarterly bundles, so claims land well inside 90 days.
- Check new providers on the NDIS Commission Provider Register.
- Get the participant's authorisation for claims. The NDIA asks plan managers to make sure participants are aware of and approve claims.
- Pay providers promptly. The NDIA says this should be within 2 business days of receiving payment from the NDIS.
- Send the monthly financial statement participants are entitled to, showing spending against expectations and the remaining balance.
- When something looks wrong, query the provider in writing and keep the thread with the invoice.

Invoice check before you pay

- ☐ Participant name and NDIS number are correct.
- ☐ One participant per invoice.
- ☐ Service dates fall inside the current plan and funding period.
- ☐ Support item numbers match the service agreement.
- ☐ Hours or quantity match what was agreed and delivered.
- ☐ Price is at or below the NDIS price limit (registered providers).
- ☐ Provider business name and ABN shown, and GST where it applies.
- ☐ Claim made within 90 days of the service (from 1 December 2026).
- ☐ Participant has authorised the claim.
- ☐ Invoice, approval and any queries filed together.

Questions people ask

When does the 90-day claims rule start?

From 1 December 2026, claims for supports under a participant's plan need to be made within 90 days of service delivery, down from 2 years.

How long do NDIS records need to be kept?

From 27 August 2026, participants or their plan managers need to keep records for NDIS support payments for 3 years. The government says providers will need to keep records about payment and receipt of NDIS funds for 7 years. More guidance on how to keep records is still to come.



What must be on an NDIS invoice?

The NDIA's minimum is the participant's name and NDIS number, dates of support, amount and quantity or hours, and support type. Invoices also need the business name, ABN, participant's address, support item number, claim type, total and any GST. One participant per invoice.

Is a written service agreement compulsory?

The NDIS says written service agreements are only mandatory for specialist disability accommodation, but recommends one every time a participant starts with a new provider.

What is the plan management panel?

By 1 October 2027 the NDIA will set up a panel of plan managers, chosen through a tender on AusTender. Participants will need to use a plan manager on the panel, with a 6-month transition period.

Will unspent NDIS funds roll over?

No. From 1 February 2027, when a plan reaches its reassessment date, unspent funds won't roll over to the renewed plan.

Is Kinship Uniting Services a registered NDIS provider?

Yes, registration number 4-GWVHCEY. You can check it on the NDIS Commission's Provider Register.



How Kinship can help you and your clients

We're a registered NDIS provider in Colebee, Western Sydney, working in disability and aged care since 2017. We know a messy invoice costs you time and costs your client confidence.

NDIS registration 4-GWVHCEY. Check us on the NDIS Commission's Provider Register, the same way you'd check anyone.

Supports, hours and rates in writing. Supports, hours and rates are written down and agreed in a service agreement before we start.

Invoices you can process. Line items that match the service agreement, with the details you need to claim.

What your clients can use us for. Daily living and personal care, community participation, life skills, respite, SIL and high intensity supports, for agency-managed, plan-managed and self-managed participants. The same support worker every visit.

If you have a client who needs support at home or in the community, call us on 0437 733 744 and we'll talk it through. And if anything on one of our invoices ever doesn't look right, call us. We'll sort it out with you.

Call 0437 733 744 or email info@kinshipunitingservices.com. Referrer information: kinshipunitingservices.com/for-referrers/

Kinship Uniting Services · Registered NDIS provider 4-GWVHCEY · 39 Victory Road, Colebee NSW 2761

Deaf, or have a hearing or speech impairment? Contact us through the National Relay Service: Speak & Listen 1300 555 727, TTY 133 677, SMS relay 0423 677 767.

Sources

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NDIS: How to support participants as a plan manager:

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NDIS: What are the record keeping requirements: <https://www.ndis.gov.au/providers/working-provider/reporting-and-record-keeping/what-are-record-keeping-requirements>

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<https://www.ndis.gov.au/participants/working-providers/arranging-supports/what-service-agreement>

NDIS: Changes to plan management: <https://www.ndis.gov.au/changes-ndis/changes-plan-management>

Department of Health, Disability and Ageing: About the changes to the NDIS: <https://www.health.gov.au/our-work/ndis-legislation-changes/amendments/ndis-amendment-securing-the-ndis-for-future-generations-bill-2026/about-the-changes-to-the-ndis>

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