

NDIS Claiming / Invoicing Policy & Template

Forge Clarity PTY LTD

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1. Purpose

This document outlines Forge Clarity's claiming and invoicing processes to ensure compliance with the National Disability Insurance Scheme (NDIS) Practice Standards, the NDIS (Provider Registration and Practice Standards) Rules 2018, and relevant Australian consumer law.

2. Scope

This policy applies to all NDIS services delivered by Forge Clarity and covers all invoicing, claiming, and documentation requirements for NDIS-funded support.

3. Legislative and Regulatory Framework

Our claiming and invoicing practices comply with:

- NDIS Act 2013 and associated Rules
- NDIS (Provider Registration and Practice Standards) Rules 2018
- NDIS Pricing Arrangements and Price Limits (current schedule)
- A New Tax System (Goods and Services Tax) Act 1999
- Australian Consumer Law (Competition and Consumer Act 2010, Schedule 2)
- Privacy Act 1988 and Australian Privacy Principles

4. Mandatory Invoice Information

All invoices issued by Forge Clarity contain the following information as required by NDIS guidelines:

4.1 Provider Information

- Provider Business Name: Forge Clarity
- Australian Business Number (ABN): 12685199124
- NDIS Provider Registration Number:
- Provider Contact Details: Phone, email, and postal address
- Invoice Number: Unique sequential invoice number
- Invoice Date: Date invoice was generated

4.2 Participant Information

- Participant Name: Full legal name of NDIS participant
- NDIS Participant Number: 9-digit NDIS number
- Participant Contact Details: (if applicable and with consent)

4.3 Service Details

For each service provided, the invoice must include:

- Service Date(s): Specific date(s) when service was delivered (DD/MM/YYYY)
- Service Time(s): Start and end time for each service delivery
- NDIS Support Item Number(s): Valid support catalogue item number
- Support Item Name: Description from NDIS Support Catalogue
- Detailed Description of Service: Clear explanation of what was delivered
- Service Duration: Total time in hours and/or units (e.g., 2.5 hours, 3 units)
- Rate Charged per Unit: Dollar amount per hour/unit as per NDIS Price Guide
- Number of Units Delivered: Quantity of service units provided
- Line Total: Calculation of rate \times units

4.4 Financial Information

- Subtotal: Total before GST (if applicable)
- GST Amount: \$0.00 (most NDIS services are GST-free)
- GST Status: Clearly marked as "GST-FREE" or "GST: N/A"
- Total Amount Due: Final amount payable
- Payment Terms: Due date and payment methods accepted
- Payment Instructions: Bank account details or payment portal information

4.5 Additional Information

- Service Agreement Reference: Reference number of current service agreement
- Plan Manager Details: (if plan-managed) - name and contact details
- Cancellation Fees: (if applicable) - clearly itemised with policy reference

5. Invoicing Procedures

5.1 Invoice Generation Timeline

- Invoices will be generated within 7 business days of service delivery
- Regular invoicing cycles: [weekly/fortnightly/monthly]
- Invoices sent via participant's preferred method (email, post, NDIS portal)

5.2 Invoice Delivery Methods

We will deliver invoices through:

- Email (PDF format)
- Participant portal access (if applicable)
- Postal mail (upon request)
- Direct submission to plan manager or NDIS (if approved)

5.3 Invoice Correction Process

If an error is identified:

1. Original invoice will be marked as "CANCELLED" or "SUPERSEDED"
2. Corrected invoice issued with new invoice number
3. Participant notified in writing of the correction
4. Credit note issued if overpayment occurred

6. NDIS Claiming Process

6.1 Claiming Methods

We submit claims through:

- NDIS myplace provider portal (for agency-managed participants)
- Direct to plan managers (for plan-managed participants)
- Direct to participants (for self-managed participants)

6.2 Claim Submission Timeline

- Claims submitted within 30 days of service delivery
- Batch claims processed [weekly/fortnightly/monthly]
- Urgent claims processed within 48 hours (where required)

6.3 Payment Tracking

- All claims tracked with unique reference numbers
- Payment receipts reconciled against invoices
- Outstanding payments followed up within 14 days
- Participant notified of any payment issues

7. Supporting Documentation

7.1 Mandatory Records (Retained for 7 Years)

We maintain the following documentation:

Service Delivery Records:

- Progress notes and case notes
- Session attendance records
- Incident and observation reports
- Service agreements and amendments
- Participant consent forms

Financial Records:

- Invoice copies (original and corrected)
- Payment receipts and remittance advices
- Cancellation records and no-show documentation
- Credit notes and refund records
- Fee schedule and pricing evidence

Compliance Documentation:

- Worker qualification and screening records
- Insurance certificates (public liability, professional indemnity)
- Service booking confirmations
- Communication logs with participants

7.2 Documentation Access

- Progress notes stored confidentially and securely
- Documentation available to participants upon request
- Information provided within 14 days of written request
- Documentation provided for NDIS plan reviews and audits
- Privacy maintained in accordance with Australian Privacy Principles

8. Pricing and Rate Compliance

8.1 Price Adherence

- All charges align with current NDIS Pricing Arrangements and Price Limits
- Price reviews conducted upon each NDIS Price Guide update
- Participants notified in writing of any price changes 14 days in advance
- No charges above NDIS maximum price limits for registered providers

8.2 Cancelled or Missed Appointments

Cancellation policy:

- Check the current Cancellation and Non-attendance Policy for NDIS Clients

9. Participant Rights and Responsibilities

9.1 Your Rights

You have the right to:

- Receive clear, itemised invoices with all mandatory information
- Request explanation of any charges
- Access copies of service records and documentation
- Query or dispute invoices within 30 days
- Request alternative invoice formats (large print, accessible formats)
- Receive timely notification of funding concerns

9.2 Our Commitments

We will:

- Provide regular invoices to help you track spending against your NDIS plan
- Alert you proactively if we notice funding concerns or if you are approaching budget limits
- Work collaboratively with your support coordinator, plan manager, or nominees
- Provide documentation for plan reviews, reassessments, or NDIA requests
- Respond promptly to invoicing queries (within 3 business days)
- Maintain transparency in all pricing and billing practices

9.3 Your Responsibilities

To assist us, please:

- Notify us promptly of any changes to your NDIS plan or participant details
- Provide accurate NDIS participant number and plan manager details
- Review invoices and raise queries within 30 days
- Notify us of cancellations in accordance with our policy
- Keep us informed of your preferred communication methods

10. Dispute Resolution

10.1 Invoice Disputes

If you believe an invoice is incorrect:

1. Contact us immediately via info@forgeclarity.com.au
2. We will acknowledge your query within 48 business hours
3. We will investigate and respond with resolution within 10 business days
4. If unresolved, we will escalate to the appropriate party
5. Payment may be suspended for disputed amounts pending resolution

10.2 External Resolution

If internal resolution is unsuccessful, you may:

- Contact the NDIS Commission (1800 035 544 or ndiscommission.gov.au)
- Seek support from your support coordinator or Local Area Coordinator
- Access free advocacy services through your state/territory advocacy organisation
- Lodge a complaint through official NDIS channels

11. Privacy and Confidentiality

All invoicing and claiming information is managed in accordance with:

- Privacy Act 1988 and Australian Privacy Principles
- NDIS Practice Standards (Supplementary Module: Privacy and Dignity of Risk)
- Forge Clarity's Privacy Policy and Secure Client Record Keeping

Personal information collected for invoicing purposes:

- Is used only for service delivery, claiming, and compliance purposes
- Is stored securely with restricted access
- Is retained for 7 years as per NDIS requirements
- Will not be disclosed to third parties without consent (except as legally required)

12. Fraud Prevention

We maintain zero tolerance for fraudulent claiming or invoicing practices:

- All services invoiced have been delivered as described
- Service records verified before claim submission
- Internal audits conducted quarterly

- Staff trained on fraud awareness and prevention
- Whistleblower protections in place
- Suspected fraud reported to NDIS Commission immediately

13. Record Retention

In compliance with NDIS Provider Registration Rules:

- Minimum retention period: 7 years from date of service
- Records stored securely (electronic and physical)
- Backup systems maintained for electronic records
- Destruction of records after retention period via secure methods
- Access logs maintained for sensitive information

14. Review and Updates

This policy will be reviewed:

- Annually or upon significant legislative changes
- Following NDIS Price Guide updates
- After internal or external audits
- In response to participant feedback

15. Contact Information

For Invoice Queries:

Contact: info@forgeclarity.com.au

Business Hours: 7am - 5pm

For Service Questions:

Contact: info@forgeclarity.com.au

NDIS Commission:

Phone: 1800 035 544

Website: ndiscommission.gov.au

Email: contactcentre@ndiscommission.gov.au

16. Acknowledgment

This policy has been developed in consultation with NDIS guidelines and reflects Forge Clarity's commitment to transparent, compliant, and participant-centered service delivery.

NDIS Claiming / Invoicing Template

FORGE CLARITY

NDIS Service Provider

<https://forgeclarity.com.au/contact>

TAX INVOICE

PROVIDER DETAILS

Business Name: Forge Clarity
ABN: 12 685 199 124
NDIS Registration No: [Insert NDIS Registration Number]
Contact Phone: 0450 205 370
Contact Email: info@forgeclarity.com.au
Postal Address: 63/3 Wulumay Close Rozelle 2039 NSW Australia
Business Hours: 7am - 5pm
Website: <https://forgeclarity.com.au/contact>

INVOICE INFORMATION

Invoice Number: [AUTO-GENERATED SEQUENTIAL NUMBER]
Invoice Date: [DD/MM/YYYY]
Service Agreement Ref: [Service Agreement Reference Number]
Payment Terms: Due Upon Receipt

PARTICIPANT DETAILS

Participant Name: [Full Legal Name of NDIS Participant]
NDIS Participant Number: [9-digit NDIS Number]
Participant Contact: [Phone/Email if applicable and with consent]

PLAN MANAGER DETAILS (If Plan-Managed)

Plan Manager Name: [Plan Manager Name or N/A]
 Plan Manager Contact: [Plan Manager Phone/Email or N/A]

SERVICES DELIVERED

SERVICE ENTRY #1

Service Date: [DD/MM/YYYY]
 Service Time: [HH:MM] to [HH:MM]
 NDIS Support Item Number: [e.g., 01_001_0107_1_1]
 Support Item Name: [Description from NDIS Support Catalogue]

Service Description:

[Detailed description of what was delivered during this service session, including specific activities, outcomes, and any relevant notes about the support provided]

Service Duration: [X.X hours / X units]
 Rate per Unit: \$[XX.XX]
 Number of Units: [X.X]
 Line Total: \$[XXX.XX]

SERVICE ENTRY #2

Service Date: [DD/MM/YYYY]
 Service Time: [HH:MM] to [HH:MM]
 NDIS Support Item Number: [e.g., 01_002_0104_1_1]
 Support Item Name: [Description from NDIS Support Catalogue]

Service Description:

[Detailed description of what was delivered during this service session, including specific activities, outcomes, and any relevant notes about the support provided]

Service Duration: [X.X hours / X units]
 Rate per Unit: \$[XX.XX]
 Number of Units: [X.X]
 Line Total: \$[XXX.XX]

SERVICE ENTRY #3

Service Date: [DD/MM/YYYY]
 Service Time: [HH:MM] to [HH:MM]
 NDIS Support Item Number: [e.g., 04_104_0136_6_1]
 Support Item Name: [Description from NDIS Support Catalogue]

Service Description:

[Detailed description of what was delivered during this service session, including specific activities, outcomes, and any relevant notes about the support provided]

Service Duration: [X.X hours / X units]
 Rate per Unit: \$[XX.XX]
 Number of Units: [X.X]
 Line Total: \$[XXX.XX]

[ADD ADDITIONAL SERVICE ENTRIES AS REQUIRED]

CANCELLATION/NON-ATTENDANCE FEES (If Applicable)

CANCELLATION FEE #1

Service Date: [DD/MM/YYYY]
 Scheduled Time: [HH:MM] to [HH:MM]
 Cancellation Date/Time: [DD/MM/YYYY at HH:MM]
 NDIS Support Item Number: [Relevant cancellation item number]
 Reason: [Late cancellation / No show]
 Policy Reference: See Cancellation and Non-attendance Policy
 Fee Amount: \$[XXX.XX]

[ADD ADDITIONAL CANCELLATION FEES AS REQUIRED]

FINANCIAL SUMMARY

Subtotal (Services): \$[XXXX.XX]

Subtotal (Cancellation Fees): \$[XXX.XX]

Total Before GST: \$[XXXX.XX]

GST Amount: \$0.00

GST Status: GST-FREE

TOTAL AMOUNT DUE: \$[XXXX.XX]

PAYMENT INSTRUCTIONS

Payment Terms: Due upon receipt

Invoice queries must be raised within 30 days of invoice date.

PAYMENT METHODS ACCEPTED:

- Direct Bank Transfer (EFT)
- NDIS myplace Provider Portal (for agency-managed participants)
- Via Plan Manager (for plan-managed participants)

BANK ACCOUNT DETAILS:

Account Name: Forge Clarity PTY LTD

BSB: 032 067

Account Number: 816377

Payment Reference: Invoice Number [ADD]

For payment queries or assistance, contact: info@forgeclarity.com.au

