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Responsibilities when managing your NDIS Plan

Having an NDIS plan means you have important responsibilities to make sure your funding is used correctly. P2P is here to support you by processing claims, paying providers, and giving you tools to track your budget. We will also let you know if your funding is being used quickly, where possible.

However, ultimately, you are responsible for managing your NDIS budget. This means checking your funding, approving invoices carefully, and making sure you do not overspend your plan.

P2P processes claims based on valid invoices and NDIS rules, but we cannot prevent overspending if you spend too much and the invoices are correct and approved.

It is important to only use your funding for supports that are approved in your plan. If funding is used incorrectly, the NDIA may review your claims, and you may need to repay the money.

Area	What are P2P's Responsibilities?	What are your responsibilities?
Invoice checking	Make sure invoices are valid, are in line with your plan, and meet NDIS or ATO rules.	Check the services you choose are supports included in your plan and budget.
Problem invoices	Let you or your provider know if something is wrong or hold payment if you inform us of a problem.	Contact your providers to fix issues if you ask us to pause a claim.
Claim submission	Submit claims to NDIA within 1–10 business days.	Approve correct claims so they can be processed.

Area	What are P2P's Responsibilities?	What are your responsibilities?
Payment processing	Pay providers within 2 business days of receiving NDIA funds.	Encourage your providers to send their invoices in a timely manner.
Reimbursements	Pay reimbursements when valid receipts are provided.	Provide receipts and or bank statements for reimbursements.
Understanding your plan	Give you resources to help you understand your NDIS plan.	Share your NDIS plan and impairment notice (if available)
Budget monitoring	Provide Platform access, tools and monthly statements to help you track your funding.	Understand that your funding needs to last the full duration of your plan. If the supports you purchase go over the approved funding, the additional amounts are generally not able to be paid for through the NDIS.
Overspending risk	Let you know (as soon as we become aware) if your budget or funding period is being spent quickly or is close to running out. Process claims that are valid, only up to the approved plan budget or funding period.	Check your budget regularly so you know how much funding is available before approving services or invoices. Ask for help if needed or unsure, especially when starting a new service.
Compliance checks	Follow NDIA rules, policies, tax rules, and Code of Conduct. Alert you if claims are delayed or rejected by NDIA.	Only use funds for approved, reasonable, and necessary supports and do not request/approve anything that does not meet the NDIS guidelines
Plan changes	Update your information and plan details if you notify us that something has changed.	Tell us if your plan, funding, or contact information change.
Respect & communication	Treat you with respect and communicate in a way that works for you.	Treat P2P staff with respect and courtesy.
Privacy & safety	Protect your privacy and act safely and honestly.	Keep your information updated and accurate.