

Plan Tracker Portal

How to create and submit an invoice



SP Sean Physio
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Step 1: Click Submit an invoice on your left-hand navigation bar

Home / Invoices / Submit an invoice

Submit an invoice

Depending how quickly you need payment, you have two options to submit your invoice.

1. The fastest option: through our Fast Payment System

Our Fast Payment System automatically processes and checks invoices for discrepancies to fast track your payment. Simply create your invoices in

Include these details in your invoice:

- Customer name
- Invoice number (Fast Payment can create one for you)
- The service provided (include the NDIS line item number if known. If not, our [NDIS Price Guide Wizard](#) will provide this in one simple search)
- The date the invoice was issued AND the date the service was delivered
- The number of hours of support provided and the hourly rate
- Invoice total including GST if applicable (GST can't be in addition to the maximum hourly rate)

Create an invoice

Create from My Templates

Step 2: Click "Create an Invoice"

Create an invoice

Please enter your invoice details below, including the support or line items, before submitting your invoice for

Invoice details

Service provider details

Sean Example Physio

Address

24, Beverly Hills 90210, 24

ABN

12345678910

Email

Phone

0412345678

Invoice number

Add a unique invoice number or let us provide one for you.

Create a unique invoice number for me

Invoice date

The issue date of the invoice.

Customer

Search for the customer you are creating this template for.

Add a new customer

Step 3: Then add a unique invoice number, the date of the service, and search to add the participant

Tip: to add a new customer you need their Surname, NDIS number and postcode.

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Step 4: Use the search bar to find the correct Support name or line item. Our handy Price Guide Wizard allows you to check the line item numbers and price limits and click "Add support item"

Add invoice items

Please ensure that all prices, rates and costs include GST if applicable.

If you're unsure of the support item name or unit price, our [NDIS Price Guide Wizard](#) provides these details in one simple search.

NDIS Service Provided

Search by support name, keyword or line item number

e.g. House and/or Yard Maintenance, Gardening or 1034537

Add support item

Cancel

Step 5: Add details about the support - dates, total hours and rate.

Add invoice items

Please ensure that all prices, rates and costs include GST if applicable.

If you're unsure of the support item name or unit price, our [NDIS Price Guide Wizard](#) provides these details in one simple search. Alternatively, if you need help finding the correct item, please contact us via the live chat button below.

Assistance With Self-Care Activities - Level 3 - Weekday Night - TTP - 01_505_0104_1_1_T

Start date	End date (optional)	Quantity	Unit price/rate	Service total
When did this service start?	When did this service end?	Amount or duration of service	Price or rate of service	

1 Jan 2023	1 Jan 2023	1.00	Hours \$20.00	\$20.00
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Save item

Remove

Add another item

Total \$20.00

Tip: if you have multiple line items, enter the line item detail, hit the "Save Item" Button and the "Add another item"

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STEP 6: Once you have saved the line item/s, tick the acknowledgement box, and press the "Submit for payment button".

Add a new customer

Add invoice items

Please ensure that all prices, rates and costs include GST if applicable.

If you're unsure of the support item name or unit price, our [NDIS Price Guide Wizard](#) provides these details in one simple search. Alternatively, if you need help finding the correct item, please contact us via the live chat button below.

House And/or Yard Maintenance - 01_019_0120_1_1 [✕](#)

Start date 🕒	End date (optional) 🕒	Quantity 🕒	Unit price/rate 🕒	Service total
12 Mar 2023	12 Mar 2023	1 Hours	\$20.00	\$20.00

[✎ Edit](#) [🗑 Remove](#)

[Add another item](#)

Total \$20.00

I acknowledge that I am responsible for the accuracy of the information contained in this request for reimbursement, and that it represents the services provided. Plan Tracker accepts no responsibility for any errors in the information provided.

[Submit for payment](#)

[Save as template](#)

[Delete invoice](#)

You have successfully submitted your invoice

Invoice submitted

✔ Invoice 123321133 has been successfully submitted.

Made a mistake? No problem - your invoice won't be submitted for the next 0:50 minutes if you want to **make changes**. Alternatively, email us at accounts@plantracker.com.au or contact us via the live chat button below during business hours.