

Plan Management Service Agreement

1. Parties

This **Service Agreement** is for _____ a Participant in the National Disability Insurance Scheme (NDIS), and is made between:

Participant /
Participant's _____
Representative NDIS Participant Number _____

Participant date of birth _____

and

Plan Manager Ideal Plan Management (NDIS Provider Number 4050 009 702), a division of Nexia Australia (ABN: 59 903 291 025)

This Service Agreement will commence on _____

The current NDIS plan starts on _____

2. The NDIS and this Service Agreement

This Service Agreement is made for the purpose of providing NDIS Financial Administration services.

A copy of the Participant's current NDIS plan is attached to this Service Agreement (**Attachment 2-Participant's NDIS Plan**).

The parties agree that this Service Agreement is made in the context of the NDIS, which is a scheme that aims to:

- support the independence and social and economic participation of people with disability, and

- enable people with a disability to exercise choice and control in the pursuit of their goals and the planning and delivery of their supports.

3. Schedule of Services

The Plan Manager agrees to provide the Participant NDIS Financial Administration services from the commencement date of this service agreement.

The services and their prices are set out in the attached Schedule of Services (**Attachment 1-Schedule of Services**). All prices are GST inclusive (if applicable) and include the cost of providing the services.

Financial Administration funding includes a set up fee and a monthly financial administration fee. This fee is for transaction processing and Service Provider liaison during the plan period.

When an invoice for a delivered support has been received by a Plan Manager, payment is requested from the National Disability Insurance Agency (NDIA) and paid to the Service Provider after the claim has been processed successfully.

4. Responsibilities of the Plan Manager

The Plan Manager agrees to:

- Communicate with the Participant / Participant's Representative openly and honestly in a timely manner
- Treat the Participant with courtesy and respect
- Give the Participant information about managing any complaints or disagreements
- Listen to the Participant's feedback and resolve problems quickly
- Give the Participant the required notice if the Plan Manager needs to end the Service Agreement (see **Section 9:Ending this Service Agreement**)
- Protect the Participant's privacy and confidential information

- Provide services in a manner consistent with all relevant laws & rules, including the [National Disability Insurance Scheme Act 2013](#), the *Australian Consumer Law* and *Accounting Professional and Ethical Standards*
- Keep accurate records on the services provided to the Participant
- Issue regular statements of the financial transactions to the Participant

5. Responsibilities of the Participant/Participant's Representative

The Participant/Participant's representative agrees to:

- Inform the Plan Manager about how they wish the services to be delivered to meet the Participant's needs
- Treat the Plan Manager with courtesy and respect
- Contact the Plan Manager if the Participant has any concerns about the services being provided
- Give the Plan Manager the required notice if the Participant needs to end the Service Agreement (see **Section 9:Ending this Service Agreement**)
- Provide the Plan Manager a full copy of their current NDIS Plan and future NDIS plan(s)
- Notify the Plan Manager immediately if the Participant's plan has been suspended, amended or reviewed, or the Participant ceases participation in the NDIS

6. Payments

The Participant has nominated the Plan Manager to undertake financial administration for their NDIS supports.

After receiving valid tax invoices from the Participant / Participant's representative and/or service providers engaged by the Participant, the Plan Manager will claim from the NDIA for funding up to the amounts specified in relevant support categories of the

Participant's NDIS plan subject to the rules and price limits set out in the NDIS Price Guide.

After receiving funding from the NDIA, the Plan Manager will make payments to the Participant / Participant's representative and/or service providers engaged by the Participant.

The Participant authorises the Plan Manager to claim from NDIA for the Financial Administration services as per the items and amounts listed at **Attachment 1 – Schedule of Services** at any time during the period of the Service Agreement, and to disburse those amounts from the funds held in the Trust Account.

7. Sharing your Information

In dealing with personal information, we abide by the obligations imposed on us under federal law, including the *Privacy Act 1988* and the *National Disability Insurance Scheme Act 2013*.

The participant gives consent to the Plan Manager to share information in relation to the NDIS budget to third parties noted below in a manner that that does not compromise the ability of the participant to exercise choice and control in the pursuit of their goals and the planning and delivery of their supports:

- Service Providers (of NDIS funded Services) engaged by the Participant
- Participant representative nominated by the participant
- Support Coordinator(s) engaged by the participant
- National Disability Insurance Agency (NDIA) and Local Area Coordination Partners

8. Changes to this Service Agreement

If changes to the services or their delivery are required, the parties agree to discuss and review this Service Agreement. The parties agree that the changes to the services or their delivery will be in writing by the parties.

In relation to the renewal of the service agreement, the Service Agreement will be automatically renewed and extended upon the provision of the Participant's new NDIS plans.

9. Ending this Service Agreement

Should either party wish to end this Service Agreement they must give one month notice in writing.

If either party breaches this Service Agreement the requirement of notice will be waived.

10. Feedback, Complaints and Disputes

If the Participant wishes to give the Plan Manager feedback, the Participant can contact the Plan Management team listed under **Section 12: Contacts** of this service agreement.

If the Participant is not happy with the provision of services and wishes to make a complaint, the Participant can contact the Plan Manager's Service Leader, Billy Kang, on 1300 800 110, or email bkang@nexiacanberra.com.au

If the Participant is not satisfied with the resolution offered by the above persons, they can contact the National Disability Insurance Agency by calling 1800 800 110, visiting one of their offices in person, or visiting ndis.gov.au for further information.

11. Goods and Services Tax (GST)

For the purposes of GST legislation, the Parties confirm that:

- A supply of supports under this Service Agreement is a supply of one or more of the reasonable and necessary supports specified in the statement included, under subsection 33(2) of the [National Disability Insurance Scheme Act 2013](#) (NDIS Act), in the Participant’s NDIS plan currently in effect under section 37 of the NDIS Act
- The Participant’s NDIS plan is expected to remain in effect during the period the supports are provided
- The Participant/Participant’s representative will immediately notify the Plan Manager if the Participant’s NDIS Plan is replaced by a new plan or the Participant stops being a participant in the NDIS

12. Contact Details

The Participant/Participant’s representative can be contacted on:

Phone	
Mobile	
Email	
Address	
Alternative contact person	

The Plan Management team can be contacted on:

Phone	1300 800 110
Email	Manager@idealplan.com.au
Website	www.idealplan.com.au
Postal Address	GPO Box 500, CANBERRA, ACT, 2601

13. Agreement Signatures

The parties agree to the terms and conditions of this Service Agreement.

Signature of
Participant/Participant's
representative

Name of Participant/Participant's
representative (please print)

Date

Signature of authorised person from
Plan Manager

Name of authorised person from Plan
Manager

Date

Attachment 1 – Schedule of Services

Support Area	Description	Budget for Plan Period
Improved Life Choices	<p>This includes the set-up costs (if applicable) and monthly financial administration fees as allocated in “Improved Life Choices” budget on the Participant’s current NDIS plan.</p> <p>*Upon renewal of the service agreement; the set-up costs (if applicable) and monthly financial administration fees as allocated in “Improved Life Choices” budget on the participant’s future reviewed NDIS plan(s).</p>	<p>Set Up Costs \$232.35</p> <p>Financial Administration - Monthly Fee \$104.45/Month</p>

Attachment 2 – Participant’s NDIS plan