

Customer Details

Name of Customer (NDIS participant):

If applicable, name of Plan Nominee (Person responsible):

A reference to the 'Customer', or 'you' or 'your' includes a reference to the Customer, or the Plan Nominee if applicable.

NDIS/NDIA

The NDIS refers to the National Disability Insurance Scheme as established by the National Disability Insurance Scheme Act 2013 (Cth). The NDIA refers to the National Disability Insurance Agency.

Plan

Plan means the written Plan developed with you and on your behalf by the National Disability Insurance Agency or their delegate.

PLAN MANAGEMENT PARTNERS

Plan Management Partners Pty Ltd (PMP) is a Registered Provider of Supports under the National Disability Insurance Scheme Act 2013 (Cth).

Agreement

This Agreement (including the Schedules) is between PMP and the Customer. The Agreement commences when you sign this Agreement, (**Commencement Date**) and will continue until terminated by either party in accordance with the Agreement.

This Agreement sets out the services which PMP will provide you (**PMP Services**) in accordance with your Plan from the Commencement Date. You may elect for PMP to provide financial and/or service intermediary activities for all or part of the supports to be delivered by other service providers (**Other Support Services**) in accordance with your Plan. You may change your election at any time with 30 days prior notice to us.

Schedule 2 of this Agreement records your election of our services and reflects your Plan provided to PMP as at the date of this Agreement.

It's important you know that:

- your Plan may be different from the details recorded in the NDIS portal; and
- PMP will provide the PMP Services in accordance with the details recorded in the NDIS portal if those details are different to your Plan.

PMP will verify the records in the NDIS portal and will advise you by email if the details recorded in the NDIS portal are different to your Plan.

You consent to:

- PMP creating or amending service bookings within the funding amounts as recorded in the NDIS portal;

- PMP accessing all the aspects of your Plan required to provide you with your elected PMP Services;
- PMP discussing your NDIS plan with the NDIA and its contractors (such as Local Area Coordinators); and
- PMP discussing the services that have been or will be delivered by your service providers

A copy of your written Plan should be provided to assist PMP in managing your plan.

Payments

PMP will seek payment for PMP Services directly from the National Disability Insurance Agency.

PMP will facilitate the payment of Other Support Services. This payment will be contingent upon:

- The support provider accepting the PMP Provider Participation terms;
- The support services satisfying the test for reasonable and necessary supports as established by the NDIA; and
- The successful claiming for these services with the NDIA.

Responsibilities of PMP

During the term of this Agreement, PMP will:

- Provide the PMP Services (as chosen by you) in a way that is consistent with all relevant laws, including the NDIS Act, the NDIS Rules, the National Privacy Principles and the Australian Consumer Law;
- Provide PMP Services only to the amount funded by your Plan;
- Keep accurate and up-to-date records of all PMP Services provided;
- Process only those claims for Other Support Services that are consistent with your Plan and with the service agreements you have informed us of or other instructions you have provided;
- Keep accurate and up-to-date records of all claims for Other Support Services processed on your behalf;
- Within the limits of our financial and/or service intermediary role, liaise with Other Support Providers on your behalf to facilitate service delivery or resolve any concerns you may have;
- Provide access to information in respect of amounts claimed and remaining balances for PMP Services and Other Support Services;

Responsibilities of PMP (continued...)

- Communicate in a timely, professional manner; and
- Make contact with the NDIA in relation to your Plan.

Responsibilities of the Customer

You agree to:

- Take ultimate responsibility for the selection of providers of Other Support Services and to inform PMP of those providers, their contact details and the service agreements / arrangements you have entered into.
- Only purchase supports that are reasonable and necessary as defined by the National Disability Insurance Agency.
- Communicate with PMP about any concerns with any relevant supports being provided, including supports provided by PMP.
- Communicate to PMP any suspension of, change, or intention to seek a change to your Plan, or if you otherwise cease to be a participant in the NDIS.
- Communicate to PMP any suspension of, change, or intention to seek a change to your provider/s of Other Support Services. Any such changes are to be in accordance with your service agreement/s with your provider/s.
- Provide PMP with a copy of any updated or revised Plan as soon as reasonably possible.

Privacy

Personal Information includes your name, address, contact details, age, date of birth, employment details, bank details and other information required under the Anti-Money Laundering and Counter Terrorism Financing Act 2006 (Cth).

Sensitive Information includes your health information, racial or ethnic background, religious beliefs or affiliations, and sexual preferences or practices.

In signing this Agreement, you consent to us:

- Collecting Personal and Sensitive Information about you for the primary purpose of providing PMP Services, including collecting such information from third parties where it is unreasonable or impracticable for us to collect it from you.
- Using and disclosing your Personal and Sensitive Information for the following purposes:
 - PMP Services provided to you.
 - Administration and operations such as accounting, risk management, record keeping, statistical analysis, planning systems development, testing, staff training and assessing and monitoring the use and performance of our websites.

- Review your Plan activity, and assist you to get the supports and services associated with your Plan;
 - Marketing (including direct marketing), planning, new product or service development, quality control, market research, customer surveys and sending you information about new services we can provide you.
 - Other purposes as may be permitted or required under the National Privacy Principles.
- Disclosing, only for the purposes set out above, your Personal and Sensitive Information to our employees, related bodies corporate, agents, contractors, service providers, health providers, financial institutions payment system operators, persons acting on your behalf, regulatory bodies, law enforcement agencies and government agencies.

You acknowledge that:

- We will collect, use and disclose your Personal or Sensitive Information in accordance with our Privacy Policy (a copy of which can be obtained from our website or by contacting us); and
- Our ability to provide you with PMP Services may be restricted if all or some of your Personal or Sensitive Information is not collected by us.

If we collect Personal or Sensitive Information about you from a third party, we will notify you of such collection in accordance with our Privacy Policy and the National Privacy Principles.

You may contact us at any time, using the contact details provided in the Feedback, Complaints and Disputes section below, if you:

- Do not wish to receive direct marketing from us.
- Would like to withdraw your consent to us using and disclosing your information for marketing purposes.

Termination

Either Party may terminate this Service Agreement at any time.

Thirty (30) days' prior notice of a termination must be given, in writing. This notice period is waived if termination is due to a serious breach of this Service Agreement by the other Party.

On provision of notice to terminate, PMP will:

- Notify the National Disability Insurance Agency and service providers providing supports against your Plan that we will no longer be acting as your intermediary after the 30 day notice period. We will also notify that we will only accept claims for payment up to the nominated date for ceasing of services.

Goods and services tax

For the purposes of s 38-38 of the A New Tax System (Goods and Services Tax) Act 1999, the Parties confirm that the supply of PMP Supports under this Service Agreement is a supply of one or more of the reasonable and necessary supports specified in the statement included, under s 33(2) of the NDIS Act, in your Plan.

Goods and services tax (GST) may be payable in respect of Other Support Services provided to the Customer by a service provider in the circumstance where that provider is not a registered service provider with the NDIA. Any GST so payable will be funded by the Customer's Plan.

- Provide you with a statement of Plan balances remaining on the last day of financial intermediary activities, within 14 days of the last day of processing transactions.

Feedback, Complaints and Disputes

You can request a copy of our Feedback & Complaints Policy or lodge any feedback / complaint by:

- Telephone 1300 333 700. PMP will attempt to resolve any matter raised on the phone at the point of call.
- Mail: PMP Level 9, 1 Rider Boulevard, Rhodes NSW
- Emailing info@planpartners.com.au or
- Submitting online at www.planpartners.com.au.

Schedule 1: Contact Details

The Customer can be contacted on:

Telephone:.....

Mobile:.....

Email:.....

Address:.....

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Date of Birth:.....

The Plan nominee (Person responsible) if applicable can be contacted on:

Mobile:.....

Email:.....

Address:.....

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Plan Management Partners can be contacted on:

Telephone 1300 333 700

Email info@planpartners.com.au

Office Locations

New South Wales

Level 9, 1 Rider Boulevard
Rhodes NSW 2138

Victoria

Level 12 / 360 Elizabeth Street
Melbourne VIC 3000

Queensland

Level 17 / 68 Ann Street
Brisbane QLD 4000

South Australia

45 Pirie Street
Adelaide SA 5000

Schedule 2: PMP Services

PMP will provide you with the following services:

Please detail the budget allocated in your NDIS plan in the below table.

Category	Budget
Plan Management ('Improved Life Choices')*	\$ □□,□□□.□□
Coordination of Supports	\$ □□,□□□.□□

*Please note that Plan Management will be featured in your NDIS plan under 'Improved Life Choices'.

PMP will check whether the details in your plan are the same as the ones in the NDIS portal. If those details are different to your Plan, PMP will provide its services in accordance with the details recorded in the NDIS portal.

After receiving this signed service agreement, PMP will confirm the amount approved by the NDIS in your Welcome Email.

If you need any assistance with filling in these details, please contact us on 1300 333 700.

Signing

Signed for and on behalf of the Customer:

Signature:

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Name:

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Date:

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