

# Customer Service Agreement



## Yes, I would like Plan Partners to help bring my NDIS Plan to life.

To register for Plan Management or Support Coordination with Plan Partners, simply fill out the details in each field and sign the last page, then return it to us by email at [info@planpartners.com.au](mailto:info@planpartners.com.au) or send it to Plan Partners, PO Box 131, Richmond VIC 3121.

If you have any questions about this form, don't hesitate to contact our team on 1300 333 700.

### **Customer Details (This is the NDIS Participant who will receive the services)**

First Name

Last Name

Phone

Mobile

Email

Date of Birth (dd/mm/yyyy)

Street

Suburb

State

Postal Code

NDIS Number

### **If applicable, person responsible (or Plan nominee)**

(Someone other than the person listed above who is responsible for the Plan, or a Plan nominee who has the legal authority to make decisions on behalf of the person listed above.)

First Name

Last Name

Phone

Mobile

Email

Relationship to the Customer

Street

Suburb

State

Postal Code

## **Plan Partners' Service Schedule**

Please confirm what services you would like Plan Partners to provide and detail the budget which has been allocated for these services in your NDIS Plan.

Please complete at least one of the service categories below. Don't include anything which you don't want, which is not included in your NDIS Plan, or which you are getting from someone other than Plan Partners.

Yes, I would like Plan Partners to provide me with Plan Management

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

The budget which has been allocated to this in my NDIS Plan is \$

Yes, I would like Plan Partners to provide me with Support Coordination

The budget which has been allocated to this in my NDIS Plan is \$

Plan Partners 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, we will provide these services in accordance with the details which are recorded in the NDIS portal.

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

## **The terms we use in this agreement**

As you read this agreement, you will come across a number of terms. It's important you understand exactly what we mean by those. To find out, refer to this handy guide.

### **NDIS/NDIA**

The NDIS means the National Disability Insurance Scheme as established by the National Disability Insurance Scheme Act 2013 (Cth). The NDIA is the National Disability Insurance Agency, which runs the NDIS.

### **PLAN PARTNERS**

Plan Management Partners Pty Ltd is a Registered Provider of Supports under the National Disability Insurance Scheme Act 2013 (Cth). In this document, we are referred to simply as 'Plan Partners'.

### **Plan**

Plan means the written Plan developed with you and on your behalf by the National Disability Insurance Agency or their delegate (for example, your Local Area Coordinator).

### **Customer**

Customer means the person for whom the Plan has been developed.

### **Our Services**

The services delivered by Plan Partners.

### **Other Support Services**

Services delivered by other Service Providers.

### **Commencement Date**

The date on which you sign this agreement. If you are filling out this form online, 'signing' means ticking the 'I accept the terms of this agreement' box and submitting the form to us.

### **Agreement**

This Agreement (including the Schedules) is between Plan Partners and the Customer. The Agreement commences on the Commencement Date and will continue until either you, or Plan Partners, terminates it in accordance with the Agreement.

This Agreement describes Our Services as they are set out in your Plan. You may elect for Plan Partners to provide Support Coordination and/or Plan Management services for all, or part, of the Other Support Services under your Plan. You can change who you elect to provide these services at any time, by giving 30 days' notice to us.

Plan Partners' Services Schedule records Our Services you have elected to use and reflects your Plan, as you have provided it to Plan Partners 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
- Plan Partners will provide the Plan Partners' Services according to the details recorded in the NDIS portal, if those details are different to your Plan.
- Plan Partners 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 agree to:

- Plan Partners making any arrangements necessary to allow your service providers to be paid from your NDIS funds on your behalf;
- Plan Partners accessing all the aspects of your Plan required to provide you with the Plan Partners' Services you have chosen;
- Plan Partners discussing your NDIS Plan with the NDIA and its contractors (like Local Area Coordinators); and
- Plan Partners discussing with service providers the Other Support Services that have been, or will be, delivered by them;
- Plan Partners claiming any travel time made by our team to meet with you personally, towards your plan as an element of our services, as stated in the current NDIS Price Guide;
- Plan Partners providing you with services in line with the terms set out in the Customer Service Agreement;
- if required for random auditing purposes, be interviewed and have your records reviewed by third party accreditation and legislative bodies;
- the terms of Plan Partners' privacy policy.

## **Payments**

Plan Partners will seek payment for our Services directly from the NDIA.

For our Plan Management services being delivered to you, Plan Partners will pay for Other Support Services on your behalf, as long as:

- The support provider accepts the Plan Partners Provider Participation terms;
- The support services satisfy the test for reasonable and necessary supports as defined by the NDIA; and
- Claims for these services with the NDIA are successful.

## **Our Responsibilities**

During the term of this Agreement, Plan Partners will:

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

- Communicate in a timely, professional manner;
- Make contact with the NDIA about your Plan when necessary; and
- Travel by the Plan Partners' team may be included in the hours of support provided to you and funded by your Plan.

### **Termination**

Either you, or Plan Partners, may terminate this Service Agreement at any time.

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

If you notify us that you want to terminate this Service Agreement, Plan Partners will:

- Notify the NDIA and the service providers which are providing supports to you under your Plan that we will no longer be acting as your intermediary once the 30 day notice period is up. We will also notify them that we will only accept claims for payment up to the date on which this Agreement ends.
- Provide you with a statement of the Plan balances remaining on the last day of Plan Management activities, within 14 days of the last day we process transactions on your behalf.

### **Feedback, Complaints and Disputes**

You can ask for a copy of our Feedback & Complaints Policy, give us feedback or make a complaint by:

- Calling Plan Partners on 1300 333 700. We will try to resolve any matter raised on the phone during the call.
- Emailing [info@planpartners.com.au](mailto:info@planpartners.com.au) or
- Submitting your feedback online at [www.planpartners.com.au](http://www.planpartners.com.au)

If our team are unable to resolve the complaint, it will go to senior management as outlined in our complaints procedure. If the complaint is still not resolved to your satisfaction, you can go to the

Disability Services Commissioner, whose contact details are on their website [www.odsc.vic.gov.au](http://www.odsc.vic.gov.au)

You can also contact the NDIA by calling them on 1800 800 110, visiting one of their offices, or going to the NDIS website [www.ndis.gov.au](http://www.ndis.gov.au)

### **Responsibilities of the Customer**

You agree to:

- Take ultimate responsibility for selecting who will provide Other Support Services and to let Plan Partners know who those providers are, their contact details and the service agreements or arrangements you have with them.
- Only purchase supports that are reasonable and necessary as defined by the NDIA.
- Let Plan Partners know about any concerns you have with any of the relevant supports which are being provided, including supports provided by Plan Partners.
- Let us know if you suspend, change, or intend to change, your Plan, or if you are no longer a participant in the NDIS.
- Let Plan Partners know if you suspend, change or intend to change your provider/s of Other Support Services. Any such changes must be in accordance with the service agreement/s you have with your provider/s.
- Provide Plan Partners with a copy of any updated or revised Plan as soon as reasonably possible.
- Plan Partners providing documents and email updates to you electronically;
- Inform Plan Partners if you do not want to receive documents or email updates electronically.

### **Goods and services tax**

- Goods and services provided in Australia are subject to s 38-38 of the A New Tax System (Goods and Services Tax) Act 1999. The Parties confirm that the supply of Plan Partners 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 on Other Support Services provided to the Customer by a service provider even if that provider is not a registered service provider with the NDIA. If so, the GST payable will be funded by the Customer's Plan.

## **Privacy**

Your privacy is important to you, and it's important to us. When we provide services to you, we will collect, use and disclose information about you. The information is known as Personal Information, and Sensitive Information.

Our Privacy Policy (which you can find on our website [www.planpartners.com.au](http://www.planpartners.com.au) or by contacting us) sets out details about what this information is, and how we collect, use and disclose it. You should read our Privacy Policy carefully – it contains important information. You don't have to consent to us collecting, using and disclosing this information where we need it to provide Plan Management or Support Coordination services. But, it's important that you know that if you do not consent, this may restrict the services we provide to you, or mean that we are not able to provide any services to you.

Of course, if you want to clarify or discuss anything about how we handle your information, you can contact us on the details in the 'feedback, complaints and disputes' section of this document.

### **By entering this Agreement, you agree that:**

- You will receive direct marketing from us unless you request otherwise.
- You can contact us at any time to let us know that you don't want to receive direct marketing material from us.

### **You acknowledge that:**

- Plan Partners will collect, use and disclose your Personal or Sensitive Information in accordance with our Privacy Policy (you can get a copy of this from our website [www.planpartners.com.au](http://www.planpartners.com.au) or by contacting us); and
- Plan Partners' ability to provide you Our Services may be restricted if we cannot collect from you all or some of your Personal or Sensitive Information.

## **Signing**

Signed for and on behalf of the Customer:

Signature

Name

Date

### **Plan Partners can be contacted on:**

Telephone 1300 333 700

Email [info@planpartners.com.au](mailto:info@planpartners.com.au)

PO Box 131, Richmond VIC 3121