

Plan Management Service Agreement

1. Parties

This service agreement is for, a participant in National disability insurance scheme(Participant) and is made Between

Participant /Participant's Representative.....

NDIS Participant Number.....
Participant date of birth.....

And

Plan Manager Proactive Plan Managers (NDIS Provider Number) 4-HD6VAGB

This Service Agreement will commence on..... for the period..... to.....

2. The NDIS and this Service Agreement

This Service Agreement is made for the purpose of providing Plan Management Financial Intermediary services.

A copy of the Participant's NDIS plan is attached to this Service Agreement.

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 Provider agrees to provide the Participant Plan Management (Financial Intermediary) services for the duration of this Service Agreement.

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

Additional expenses (i.e. things that are not included as part of a Participant's NDIS plan) are the responsibility of the Participant / Participant's Representative and are

not included in the cost of the services. Examples include entrance fees, event tickets, meals, etc.

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
- consult the Participant on decisions about how services are provided
- 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 provider needs to end the Service Agreement (see 'Ending this Service Agreement' below for more information)
- protect the Participant's privacy and confidential information
- provide services in a manner consistent with all relevant laws, including the National Disability Insurance Scheme Act 2013 and rules, the Australian Consumer Law and Accounting Professional and Ethical Standards; keep accurate records on the services provided to the participant
- issue regular invoices and statements of the supports delivered 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
- talk to 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 'Ending this Service Agreement' below for more information), and
- provide the Plan Manager a full copy of their current NDIS plan, and let the Plan Manager know immediately if the Participant's NDIS plan is suspended, amended or replaced by a new NDIS plan or the Participant stops being a participant in the NDIS.

6. Payments

The Plan Manager will seek payment for their provision of services after the delivery of scheduled services.

The Participant has nominated the Plan Manager to manage the funding for his/her 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 NDIA for funding up to the amounts specified in relevant support categories of the Participant's NDIS plan. After receiving funding from NDIA, the Plan Manager will make payments to the Participant / Participant's representative and/or service providers engaged by the Participant.

The Participant authorizes the Plan Manager to claim from NDIA for the Plan Manager's services 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 trust.

7. 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 any changes to this Service Agreement will be in writing, signed, and dated by the parties.

8. Ending this Service Agreement

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

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

9. Feedback, Complaints and Disputes

If the Participant wishes to give the provider feedback, the Participant can talk to the Plan Manager's nominated contact person (see 'Contact details' below).

If the Participant is not happy with the provision of services and wishes to make a complaint, the Participant can talk to the Plan Manager's Managing Partner, Saurabh Chaudhry, on 03 8732 9197, or email caring.proactive@gmail.com

If the Participant is not satisfied or does not want to talk to this person, the Participant 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.

10. 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; and
- 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.

11. Contact Details

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

Phone	
Mobile	
Email	
Address	
Alternative contact person	Phone: Email:

The Plan Manager can be contacted on:

Contact Person	SAURABH CHAUDHRY
Phone	03 8732 9197
Mobile	0424 513 740
Email	Caring.proactive@gmail.com
Address	26 Station rd Melton south VIC 3338

12. 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 authorized person from Plan Manager

Name of authorized person from Plan Manager

Date



Attachment 1 – Schedule of Services

PLAN MANAGEMENT SERVICE FEES

Financial Intermediary Services	Set Up Costs	Monthly Processing
Capacity Building Supports: Improved Life Choices	\$232.35	\$104.45

Service	Description	Price
Improved life choices	plan management (financial intermediary)	\$ 1504.85

Attachment 2 – Participant’s NDIS plan