

## Plain English Service Agreement for Plan Management Services

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### About this Service Agreement

This is a Plain English version of the service agreement between the client ('you') and My Plan Manager ('us').

It's been written to help you understand the full service agreement between you and us.

If there's any difference between this Plain English service agreement and the [full service agreement](#), then we'll follow the full service agreement.

If you need any help understanding what the full service agreement means, you can ask someone to support you (like a family member, friend, or support person) or you can check with us.

### About the Plain English Service Agreement

- The service agreement is a '**contract**' between you and us.
- It starts on the date it's signed.
- The service agreement only needs to be signed once. Then, the contract between you and us stays in place for as long you're our client.
- You don't have to sign a new service agreement if your National Disability Insurance Scheme (NDIS) plan changes.

### Terms & Conditions

#### 1. Services covered by the Service Agreement

- We'll provide NDIS '**plan management**' services to you.
- This means we'll process your invoices and help you manage your NDIS budget.
- We can also provide other services to help you manage your service providers.
- We can only do this if you have plan management funding in your NDIS plan.

## 2. Your Responsibilities

You need to:

- Be respectful to our staff.
- Let us know if you've got any concerns.
- Make sure you only use NDIS money to work towards the goals in your NDIS plan.
- Give us the information we need to pay invoices and manage your NDIS budget.
- Check your NDIS budget on our client portal (web or app).
- Let us know if your NDIS plan changes.
- Tell us the truth.

## 3. Our Responsibilities

We need to:

- Treat you with respect.
- Listen to what you say.
- Help you manage your NDIS budget.
- Pay your invoices if they're approved by the National Disability Insurance Agency (NDIA).
- Make sure you have all the information you need about your NDIS budget.
- Speak with you about your NDIS budget and invoices if we've got questions.

## 4. How your Service Providers get Paid

- Your providers can send their invoices to us for us to process.
- If you want to, you can ask to see the invoices before we process them.
- We'll check the invoices and, if they're ok, we'll send them to the NDIA.
- We'll pay you or your providers (depending on who the invoice is from) when the NDIA sends us the money.

## 5. How does My Plan Manager get Paid?

- The NDIA will put money in your NDIS plan for plan management services. That money is separate to your other NDIS money.
- We'll be paid an '**establishment fee**' from that money when you become our client.
- After that, the NDIA will pay us a '**monthly fee**' from that money.
- You can use other money in your NDIS plan to pay us to help you to manage your plan better, but only if the NDIA gives you money for that.

## 6. When your NDIS Plan Changes

- You need to let us know as soon as possible when you get a new NDIS plan.
- This will help to make sure your providers get paid properly.

## 7. What if Something Goes Wrong with your Providers?

- You can let us know if you have concerns about a provider.
- We're not responsible for what your providers do or say. Their actions aren't our responsibility, but we'll try to help you.

## 8. Ending the Service Agreement

- If you don't want to be our client any more, you can tell us you want to end the service agreement.
- Usually, you need to give us 28 days' notice if you want to end the service agreement.
- If we want to end the service agreement, we need to give you 28 days' notice too.
- We can both end the service agreement earlier if there's a serious issue.
- Usually, giving each other 28 days' notice help to make sure your invoices are processed.

## 9. Privacy

- There are laws to protect your privacy.
- Our [‘Privacy & Dignity Policies and Procedures’](#) are on our website.
- You can choose who we share information about your NDIS plan and budget with.
- To choose, just fill out our [‘Client Consent to Obtain & Release Information Form’](#).
- You should contact us if you’re worried about your privacy, and we’ll try to help you.
- Other people can ask us to give them information about you. We usually have to give it to them if it is the law.

## 10. Feedback & Complaints

- Our [‘Client Feedback & Complaints Statement’](#) is on our website.
- If you want to write feedback or a complaint, you can email us at: [feedback@myplanmanager.com.au](mailto:feedback@myplanmanager.com.au).
- You can also send us feedback or a complaint through our [website](#).
- You can also give feedback about us or make a complaint to the NDIS Quality and Safeguards Commission at any time.

## 11. Good & Services Tax (GST)

- The money we get from your NDIS plan includes Goods and Services Tax (GST).
- You don’t have to do anything about GST.

## Information

### 1. Your Information

Your First Name	<div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="display: flex; justify-content: space-between; font-size: 8px; margin-top: 2px;"> <span>First Name</span> <span>Middle Name</span> </div>
Your Surname	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>
Your Date of Birth	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>
Your NDIS Participant Number	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>
Your Telephone Number	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>
Your Email Address	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>
Your Home Address	<div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="display: flex; justify-content: space-between; font-size: 8px; margin-top: 2px;"> <span>State</span> <span>Post Code</span> </div>

### 2. Someone else who makes decisions for you

**(Don't complete this box if you make your own decisions)**

Please complete this box if you have an Authorised Representative who makes decisions for you.

An Authorised Representative must be a person recognised by the NDIA as a substitute decision maker or nominee.

Their First Name	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>
Their Surname	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>
Their Role in your Life (As recognised by the NDIA)	<div style="display: flex; flex-direction: column; gap: 10px;"> <div style="display: flex; justify-content: space-between; align-items: flex-start;"> <span>A family member</span> <div style="border: 1px solid black; width: 150px; height: 20px;"></div> </div> <div style="display: flex; justify-content: space-between; align-items: flex-start;"> <span>Someone appointed as a plan nominee</span> <div style="border: 1px solid black; width: 150px; height: 20px;"></div> </div> <div style="display: flex; justify-content: space-between; align-items: flex-start;"> <span>A legal guardian</span> <div style="border: 1px solid black; width: 150px; height: 20px;"></div> </div> </div> <p style="font-size: 8px; margin-top: 10px;"><i>[Please note: My Plan Manager reserves the right to confirm the information provided above with the NDIA]</i></p>

Their Telephone Number	
Their Email Address	
The Home Address	
Please tell us how they were chosen to make decisions for you <i>(and give us documents that show us)</i>	

**Note:** The Authorised Representative must **NOT** be your service provider or a support coordinator

### Is there someone else you'd like us to contact?

#### Alternative contact person (if applicable)

Their First Name		
	First Name	Middle Name
Their Surname		
Their Telephone Number		
Their Email Address		
How do you know them?		
Would you like them to see information about your NDIS budget <i>(e.g., on our client portal – web and app)?</i>	Yes <input type="checkbox"/>	No <input type="checkbox"/>

#### My Plan Manager contacts

Our Telephone Number	1800 861 272
Our Email Address	<a href="mailto:enquiries@myplanmanager.com.au">enquiries@myplanmanager.com.au</a>
The Address of our Main Office	Level 9, 400 King William Street Adelaide SA 5000

Please make sure you:

- Read all the pages of this service agreement
- Provide all the information we've asked for
- Sign the 'Acceptance of the service agreement' section below
- Send us an email with the signed service agreement to:  
[enquiries@myplanmanager.com.au](mailto:enquiries@myplanmanager.com.au)

My Plan Manager will contact you to make sure we have everything we need.

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## Acceptance of the service agreement

Signature:

Your Full Name:

Date: