

Service Agreement for Plan Management Services

Parties:

This Service Agreement (**Agreement**) is between My Plan Manager.com.au Pty Ltd ACN 617 963 676 (**My Plan Manager**), and the Client as defined below (who is a NDIS participant and is aged 18 or above).

An Authorised Representative (who is a person who is recognised as such by the National Disability Insurance Agency (**NDIA**) or that has otherwise been legally appointed to act on behalf of the Client) may execute this Agreement on behalf of the Client, in which case the Terms and Conditions below will also apply to the Authorised Representative.

The purpose of this Agreement is to set out the terms and conditions in respect of which My Plan Manager will provide the Client/Authorised Representative with management of funding for supports in respect of the Client’s NDIS Plan.

This Agreement will be in effect from the date the Client or Authorised Representative signs this Agreement below, or accepts the Agreement on-line, and will continue for the duration of the Client’s association with My Plan Manager until either party terminates this Agreement in accordance with clause 8 of the Terms and Conditions of this Agreement.

Participant Information

NDIS Participant’s Full Name			
	<small>First Name (Client)</small>	<small>Middle Name</small>	<small>Surname</small>
NDIS Number		<small>Date of Birth</small>	
Initial NDIS Plan Dates	<small>From: <input style="width: 60%;" type="text"/> to: <input style="width: 30%;" type="text"/></small>		
Contact Number			
Email Address			
NDIS Participant’s Address			
	<small>State</small>	<small>Postcode</small>	

Authorised Representative (if client is not primary decision maker)

Must be a person recognised by the NDIA as a substitute decision maker or nominee.

Full Name			
	<small>First Name (Authorised Representative)</small>	<small>Middle Name</small>	<small>Surname</small>
Relationship with Participant (As recognised by the NDIA)	<small>A family member recognised by the NDIA as a Plan Nominee</small> <input style="width: 40px; height: 20px;" type="checkbox"/>	<small>A person appointed by the NDIA as a Plan Nominee</small> <input style="width: 40px; height: 20px;" type="checkbox"/>	<small>Third-Party legally appointed guardian/other*</small> <input style="width: 40px; height: 20px;" type="checkbox"/>

	<i>(Please Note: My Plan Manager reserves the right to confirm the information provided above with the NDIA)</i>
Contact Number	
Email Address	
Address of Authorised Representative	
*Circumstances of appointment (please provide supporting documents)	

Note: The Authorised Representative must **NOT** be a person who has a financial interest in the operation of this Agreement, a Service Provider or a Support Co-Ordinator unless specifically appointed by a Public Trustee or equivalent body for the purposes of this Agreement.

Alternative Contact Person (if applicable)

Full Name			
	First Name	Middle Name	Surname
Contact Number			
Email Address			
Relationship with client			
Allow Access to on-line MPM portal ("read only")	Yes	<input type="checkbox"/>	No <input type="checkbox"/>

My Plan Manager can be contacted on:

Phone:	1800 861 272
Email Address:	enquiries@myplanmanager.com.au
Address:	400 King William St, Adelaide SA 5000

Please ensure that you read all the pages of this Agreement (including **Annexure A** and **Annexure B**), provide all relevant details above, and complete and sign the "Acceptance of this Service Agreement" below on page 6. Please return the signed Agreement via email to: enquiries@myplanmanager.com.au.

After submission of this signed Agreement to the above email address, a My Plan Manager staff member will contact you regarding the completion of the sign-up process.

TERMS AND CONDITIONS

1. Schedule of Supports

- 1.1. Provided that NDIS funds are available for My Plan Manager to access on the NDIA portal relevant to the Client, My Plan Manager agrees to provide the supports to the Client as set out in **Annexure B** below.
- 1.2. The prices set out in **Annexure B** are GST inclusive (if GST applies) and include the fees for providing the stated supports. The fees will be automatically updated from time-to-time in line with changes to the NDIA Price Limits and/or other documents or publications issued by the NDIA from time-to-time.

2. Your Responsibilities

By entering into this Agreement, the Client/Authorised Representative agrees to:

- 2.1. Treat My Plan Manager staff with courtesy and respect.
- 2.2. Advise My Plan Manager of preferred contact methods.
- 2.3. Ensure that any funds received from the NDIA are used to assist you to achieve your NDIS Plan goals and are spent in accordance with your NDIS Plan.
- 2.4. Monitor budget information made available by My Plan Manager to reduce the risk of overspending in relation to your NDIS Plan.
- 2.5. Provide My Plan Manager with information in a timely manner as requested in accordance with the provisions of this Agreement or as otherwise reasonably requested from time-to-time.
- 2.6. Ensure that all claims for reimbursements include evidence of payment having been made to the extent requested by My Plan Manager and in accordance with the requirements of the NDIA, the Australian Taxation Office (**ATO**) or any other regulatory body.
- 2.7. Acknowledge that there is no contractual or inferred relationship between My Plan Manager and any of the chosen service provider/s of the Client/Authorised Representative.
- 2.8. Not engage in conduct or knowingly provide My Plan Manager with misleading or incorrect information which may reasonably be expected to:
 - 2.8.1. Expose My Plan Manager to reputational, regulatory, or financial risk.
 - 2.8.2. Present a work, health and safety risk to any My Plan Manager staff (including its contractors and agents). This extends to and covers any verbal or written abuse.
 - 2.8.3. Be contrary to NDIA rules, guidelines, legislation, relevant policies and/or any other documents or publications as may be issued by the NDIA from time-to-time.
 - 2.8.4. Be contrary to, or cause My Plan Manager to potentially breach, the *National Disability Insurance Scheme Act 2013* (Cth) (**NDIS Act**) or any other law or regulation (including conditions which relate to the registration requirements of My Plan Manager).
- 2.9. Refrain from engaging any in action with a view to obtaining funds from the NDIA to which you are not entitled within the meaning of section 182 of the NDIS Act.

3. Our Responsibilities

By entering into this Agreement, My Plan Manager agrees to:

- 3.1. Treat the Client/Authorised Representative with courtesy and respect.
- 3.2. Use the Client/Authorised Representative's preferred method of communication wherever practicable.
- 3.3. Assist and support the Client/Authorised Representative to manage their NDIS funding in accordance with their NDIS Plan, the requirements of the NDIA and the ATO, if requested
- 3.4. Make budget information available by:
 - 3.4.1. Tracking expenditure against the Client's budget by making relevant budgetary information available online via the My Plan Manager Client portal
 - 3.4.2. Making monthly statements available on-line to the Client/Authorised Representative.
- 3.5. Refer any service provider enquiries back to the Client/Authorised Representative in circumstances when permission to liaise with the service provider has been withheld by the Client/Authorised Representative.
- 3.6. Have mechanisms in place to manage and mitigate potential conflicts of interest.
- 3.7. Raise any concerning conduct or behaviour (whether by the Client/Authorised Representative, service provider or any other third-party) with the Client/Authorised Representative and seek a satisfactory solution.

4. My Plan Manager Fees

- 4.1. My Plan Manager will directly claim establishment and monthly fees against the Client's NDIS Plan from the NDIA for the provision of plan management or individual capacity building supports (e.g., Self-Management or Preparation for Self-Management and Plan Management, including Kinora Services if applicable) as set out in **Annexure B**.

5. Service Provider Claims

- 5.1. My Plan Manager will submit for payment via the NDIA Portal, invoices submitted by the Client's service providers to My Plan Manager provided such invoices meet NDIA and ATO requirements, and the services/supports relate to services or purchases made in accordance with the Client's NDIS Plan.

6. Changes to the Plan

- 6.1. The Client/Authorised Representative agrees to immediately notify My Plan Manager and provide relevant plan details in writing if the Client's NDIS Plan is varied, extended, reassessed, or replaced, or the Client ceases to be a participant in the NDIS.

7. Liability

- 7.1. The Client/Authorised Representative agrees that:
 - 7.1.1. My Plan Manager only provides services in the nature of management of funding for Supports in respect of the Client's NDIS Plan; and
 - 7.1.2. My Plan Manager will not be responsible for any harm or loss that the Client /Authorised Representative may suffer due to:

7.1.2.1 Actions taken by, or omissions made by third parties (including but not limited to any NDIS registered or unregistered service providers or the NDIA) that are outside the control of My Plan Manager; or

7.1.2.2 The non-payment to a third party on behalf of the Client/Authorised Representative, or directly to a Client/Authorised Representative, of an invoice or reimbursement claim (as may be the case) submitted to My Plan Manager and/or the NDIA, for a reason that is outside the control of My Plan Manager, due to the presence of a non-compliance issue with a document submitted to My Plan Manager, due to a lack of funds in the relevant NDIS plan of the Client/Authorised Representative or any other reasonable circumstance in which My Plan Manager considers it inappropriate to process such a claim.

My Plan Manager will use its best endeavors to lessen the negative impact of events that are beyond its control when it is needed and appropriate.

8. Ending this Service Agreement

- 8.1. Either Party may end this Agreement at any time by giving the other party at least twenty-eight (28) days' notice in writing, unless agreed otherwise by the parties.
- 8.2. If a Party materially breaches this Agreement, the other party may terminate this Agreement immediately by notice in writing to the other party.
- 8.3. Notwithstanding the provisions of 8.2. the parties may otherwise agree to a remediation period to correct the material breach before enacting Clause 8.2.

9. Privacy

- 9.1. My Plan Manager is respondent to the *Privacy Act 1988* (Cth), the Australian Privacy Principles and the NDIS Act. A copy of My Plan Manager's Privacy and Dignity Policy is available on the My Plan Manager website. My Plan Manager will only collect information required for the purposes of the operation of this Agreement and our responsibilities as a plan manager.
- 9.2. By signing below, the Client/Authorised Representative authorises My Plan Manager to collect, handle, use, disclose and otherwise deal with their personal and sensitive information in accordance with Australia's privacy laws and the NDIS Act and with the terms of My Plan Manager's Privacy Policy, and the specific consent provisions advised by the Client/Authorised Representative when completing the My Plan Manager "Consent to Obtain and Release Information Form" or any other specific direction provided to My Plan Manager.

10. Warranties and Representations

- 10.1. The Client/Authorised Representative warrants and represents that:
 - 10.1.1. All information supplied by it to My Plan Manager under this Agreement to enable it to provide the services is accurate in all material respects.

- 10.1.2. Before they signed this Agreement below, they obtained independent legal advice in respect of this Agreement or have had the opportunity to obtain such independent legal advice.
 - 10.1.3. They have in no way been pressured to enter into this Agreement or been the subject of any duress (in any form) which has caused them to enter into this Agreement.
 - 10.1.4. All claims which they instruct My Plan Manager to submit on their behalf are a true reflection of goods and services provided to the Client in line with the NDIA rules, guidelines, legislation, relevant policies and/or any other documents or publications as may be issued by the NDIA from time-to-time.
- 10.2. My Plan Manager warrants and represents that the information it provides the Client/Authorised Representative under or in connection with this Agreement is correct and current at the time the communication is made by My Plan Manager.

11. Goods and services tax (GST)

- 11.1. For the purposes of GST legislation, the parties agree that the supports provided by My Plan Manager in the Schedule of Supports set out in Annexure B below are a GST-free supply (unless advised otherwise by My Plan Manager).

12. Feedback, complaints, and disputes

- 12.1. If the Client/Authorised Representative wishes to provide feedback, or is not satisfied with the provision of supports and wishes to make a complaint, the Client/Authorised Representative should provide details via the My Plan Manager website or by emailing Feedback@myplanmanager.com.au or contacting My Plan Manager on 1800 861 272. A copy of the My Plan Manager Feedback and Complaints Policy is available on the My Plan Manager website.
- 12.2. Nothing in this agreement prevents a Client/Authorised Representative from making a complaint directly to a third-party (e.g., NDIS Complaints Commission).

13. Miscellaneous

Entire Agreement

- 13.1. This Agreement contains the entire understanding and agreement between the parties on the subject matter of the Agreement and supersedes all prior communications.
- 13.2. Each party acknowledges that, except as expressly stated in this Agreement, that party has not relied on any representation, warranty or undertaking of any kind made by or on behalf of the other party in relation to the subject matter of this Agreement, or otherwise.

Force Majeure

- 13.3. My Plan Manager shall not be liable for delay or failure to perform its obligations under this Agreement if the cause of the delay or failure is beyond its control.

Waiver

- 13.4. Failure by My Plan Manager to enforce any of the terms and conditions contained in this Agreement shall not be deemed to be a waiver of any of its rights or obligations under this Agreement.
- 13.5. A single or partial exercise of a power or right conferred on the party by this Agreement does not preclude a further exercise of the same or the exercise of any other power or right under this Agreement.
- 13.6. A waiver of a breach does not operate as a waiver of any other breach.

Severability

- 13.7. If any provision of this Agreement shall be invalid, void or illegal or unenforceable, the validity, existence, legality and enforceability of the remaining provisions shall not be affected.

Variations

- 13.8. Acting reasonably and to the extent reasonably necessary to protect its legitimate business interests, My Plan Manager may amend any terms of this Agreement by providing the Client/Authorised Representative with a notice period of up to 90 days wherever practicable (if the change is not adverse to you, we may provide a shorter notice period). This will give you ample time to review and consider the changes. Upon being notified of the change, you have the right to terminate this Agreement. If you wish to discuss the variation or terminate this Agreement as a result of our change/s, please contact My Plan Manager. If you choose to terminate the Agreement due to a change made by us under this clause, please note that My Plan Manager does not impose any exit or cancellation fees. Additionally, if any law mandates a minimum prior notice period for a variation to take effect, My Plan Manager will comply with that minimum notice requirement.
- 13.9. Any variation/s sought by the Client /Authorised Representative will only be binding upon My Plan Manager upon My Plan Manager agreeing to such variation/s in writing.

Assignment

- 13.10. Acting reasonably, the parties may assign their rights under this Agreement to a third-party by giving prior written notice to the other party thirty (30) business days prior to the proposed date of assignment. Upon being notified of the proposed assignment, the opposing party has the right to terminate this Agreement, which it can exercise by notifying the other party in writing within the thirty (30) business day period, or as otherwise agreed in writing between the parties. If the Client/Authorised Representative chooses to terminate the Agreement due to a proposed assignment under this clause, please note that My Plan Manager does not impose any exit or cancellation fees. Additionally, if any law mandates a minimum prior notice period for a variation to take effect, My Plan Manager will comply with that minimum notice requirement.

Jurisdiction

- 13.11. These terms and conditions and all matters concerning the relationship between My Plan Manager and the Client/Authorised Representative shall be governed by the law of the State of South Australia and the parties submit to the exclusive jurisdiction of the Courts of South Australia for the conduct of any litigation.

ACCEPTANCE OF THIS SERVICE AGREEMENT

This Service Agreement can only be entered into by My Plan Manager and the Client, who is a NDIS Participant (but may be executed by an Authorised Representative of the Client on behalf of the Client).

Signed : _____

Print Name : _____

Date : _____

NOTE: If the person authorising this Agreement is not the Client or is not the same person(s) listed by the NDIA as a Plan Nominee or other appointed guardian, My Plan Manager may decline to process a claim submitted for processing to the NDIA.

Annexure A

Reimbursements

Client/Authorised Representative bank details for reimbursement.

NOTE 1: This section is **ONLY TO BE COMPLETED** if the Client/Authorised Representative intends to seek direct reimbursement for any purchases made to assist the Client to implement their NDIS Plan. Such purchases **MUST** be made in accordance with the provisions of this Agreement.

NOTE 2: To reduce the risk to Clients/Authorised Representatives, it is the policy of My Plan Manager to recommended that Clients require their service providers to submit their claims to My Plan Manager for processing and that Clients do not directly pay for disability related services and supports.

NOTE 3: My Plan Manager, in its complete discretion, reserves its right to refuse to process any reimbursements by the Client/Authorised Representative and may contact a service provider to confirm payments of invoices for which reimbursements have been sought.

Account Holder's Name:			
Account Name:			
Bank:		Branch:	
BSB:		Account No.:	

Annexure B

Schedule of Supports

The “description of support” and “price limit” contained in the following Schedule of Supports will be varied from time-to-time in line with changes to the NDIS Pricing Arrangements and Price Limits and/or other documents or publications issued by the NDIA from time-to-time.

Plan Management - Establishment and Monthly Fee		
Support Item	Description of Support	Price Limit
Plan Management - Financial Administration (14_034_0127_8_3)	<p>A monthly fee for the ongoing maintenance of the financial management arrangements for managing of funding of supports</p> <p>*Monthly fee may differ depending on what is included in your plan and/or your location.</p>	<p>\$104.45*per month Remote \$146.23* per month Very Remote \$156.67*per month</p>
Plan Management and Financial Capacity Building- Set Up Costs (14_033_0127_8_3)	<p>An establishment fee for setting up of the financial management arrangements for managing of funding of supports, as set in the plan, for the duration of the plan as specified by the NDIA.</p>	<p>\$232.35 set-up cost* Remote \$325.29* Very Remote \$348.54*</p>
Self-Management Capacity Building (01_134_0117_8_1)	<p>Self-Management or Preparation for Self-Management and Plan Management</p> <p>This support item focuses on strengthening the participants ability to undertake tasks associated with the management of their supports.</p> <p>The support item includes the use of associated Kinora Plan Management NDIS Learning Modules designed to strengthen a participant’s ability to undertake tasks associated with the plan management of their supports.</p>	<p>\$70.87 per hour</p> <p>Remote \$99.22 per hour</p> <p>Very Remote \$106.31 per hour</p> <p>\$210 Standard support fee based on unit price limit referenced above</p>