



Service Agreement: Provision of Financial Intermediary Services

Parties

This Service Agreement is between Corcol Holdings Pty Ltd trading as **Plan Manage Assist** (ABN 91 622 305 711) located at Suite G7, 283 Alfred Street, North Sydney NSW 2060 and the participant/nominated representative in the National Disability Insurance Scheme (participant) as identified in this agreement.

This Service Agreement will commence from the date of this agreement and will continue in effect for the duration of the Participant's association with Plan Manage Assist, or until we are notified otherwise in writing by the Participant/nominated representative.

To engage the services of Plan Manage Assist, upon acceptance of this Service Agreement, the Participant/nominated representative, will provide their NDIS plan details, and NDIS Number to Plan Manage Assist.

The NDIS and this Service Agreement

This Service Agreement is made for the purpose of providing supports under the participant's NDIS plan.

A copy of the participant's NDIS plan is attached to this Service Agreement unless otherwise noted.

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.

Schedule of supports

Plan Manage Assist agrees to provide the Participant with financial intermediary services.

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

Additional expenses (i.e. items/support that are not included as part of a Participant's NDIS supports) are the responsibility of the (participant/nominated representative) and are not included in the cost of the supports.



Responsibilities of the provider, Plan Manage Assist

Plan Manage Assist agrees to:

- provide financial intermediary services for the participant/nominated representative.
- pay supplier invoices on behalf of the participant/nominated representative.
- reconcile client balances.
- track client expenditure against budget.
- provide expenditure reports (via website) or on request to participant/nominated representative as per the Terms of Business for Registered Providers.
- assist participant/nominated representative with trouble shooting (if required).
- liaison with participant/nominated representative via email, phone etc.
- communicate openly and honestly in a timely manner.
- treat the participant/nominated representative with courtesy and respect.
- give the participant information about managing any complaints or disagreements and details of the provider's cancellation policy (if relevant).
- listen to the participant's feedback and resolve problems quickly.
- protect the participant's privacy and confidential information as per Plan Manage Assist Privacy Policy on the Plan Manage Assist website.
- provide supports in a manner consistent with all relevant laws, including the [National Disability Insurance Scheme Act 2013](#) and rules and the [Australian Consumer Law](#); keep accurate records on the supports provided to the participant.
- give the participant the required notice if the provider needs to end the Service Agreement (see '[Ending this Service Agreement](#)' below for more information).

Responsibilities of the Participant/nominated representative

I agree to:

- inform Plan Manage Assist about how they wish the supports to be delivered to meet the participant's needs
- treat Plan Manage Assist employees with courtesy and respect
- talk to Plan Manage Assist if you have any concerns about the service being provided.
- give the provider the required notice if the participant needs to end the Service Agreement (see '[Ending this Service Agreement](#)' below for more information), and
- advise Plan Manage Assist immediately if the participant's NDIS plan is suspended or replaced by a new NDIS plan or the participant stops being a participant in the NDIS.



Payments:

Plan Manage Assist will claim payment directly from the NDIA an agreed monthly fee for their provision of supports as agreed in Schedule of Supports – Improved Life Choices (Support Category 14), upon acceptance of this service agreement.

By nominating Plan Manage Assist to provide plan management services and manage the funding, we will claim from the NDIA portal for funding up to the amounts specified in the support category and budget approved in the Participant's current NDIS plan. After these supports are delivered, the service provider or Participant/nominated representative will claim payment for those supports from Plan Manage Assist – by forwarding an invoice to:

accounts@planmanageassist.com.au

Managing Participant budgets

The Participant/nominated representative must provide details of their support budgets as per the current Participant's current NDIS plan.

If the support categories or budgets change, Participant/nominated representative agrees any changes will be sent immediately in writing to Plan Manage Assist, signed, and dated by the Participant/nominated representative.

Changes to this Service Agreement

The Participant/nominated representative agrees to immediately notify Plan Manage Assist of any changes to plans in writing including:

- if the Participant's NDIS Plan is replaced by a new plan, or
- if the Participant ceases to be a participant in the NDIS.

Ending this Service Agreement

Should either party wish to end this Service Agreement they must give one months' notice in writing. If either party seriously breaches this Service Agreement the requirement of notice will be waived.

Feedback, complaints and disputes

If the Participant/nominated representative wishes to give the provider feedback, is not happy with the provision of supports and wishes to make a complaint, the Participant/nominated representative can contact John Corrigan on 1300 199 960 or by email

jcorrigan@planmanageassist.com.au

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.



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/nominated representative will immediately notify Plan Manage Assist if the participant's NDIS Plan is replaced by a new plan or the participant stops being a participant in the NDIS.
- Plan Manage Assist will pay GST as per specified in National Disability Insurance Scheme Act 2013 (NDIS Act).



Contact details

The Participant:

NDIS Participant's Full Name	
NDIS Number	
Participants DOB	
Current Plan Start Date	
Current Plan End Date	

The Participant/nominated representative's contact details:

Primary Contact Name	
Relationship to Participant	
Phone Number (home/business)	
Email	
Address	

Secondary Contact Name	
Relationship to Participant	
Phone Number (home/business)	
Email	
Address	

Plan Manage Assist can be contacted on:

Contact Name	Kathleen Collins
Phone	1300 199 960
Email	enquiries@planmanageassist.com.au
Address	Suite G7, 283 Alfred Street, North Sydney.2060



Schedule of Supports – Improved Life Choices

Support List the name of the support.	Description of support List the details of the support, including scope and volume.	Price and payment information
Financial Intermediary Set-up costs (14_033_0127_8_3)	<ul style="list-style-type: none"> • Loading of client details into client management system • Receipt of funding • Setting up client account within finance system • Loading plan and setting service and budget allocation 	\$232.35 set-up fee
Financial Intermediary monthly processing (14_034_0127_8_3)	<ul style="list-style-type: none"> • Reconciling client balances management • Paying supplier invoices on behalf of the client • Processing client re-imburement claims • Tracking expenditure against client budget • Monthly statements of expenditure and available funding • Assisting with purchases • Trouble shooting • Client liaison - emails, phone calls etc. 	\$104.45 per month x 12 = \$1,253.40
	Total:	\$1,485.75
	OPTIONAL SUPPORT	
Extra Activities: Plan Management activities (14_031_0127_8_3)	<ul style="list-style-type: none"> • Setting up and undertaking regular liaison with providers and monitoring support provision. 	\$61.76 per hour

Please note - any changes are in accordance with the NDIA pricing guide.



Disclaimer

Plan Manage Assist provides all information in good faith and to the best of our knowledge is correct at time of communication. However, from time to time changes may impact on the accuracy therefore Plan Mange Assist gives no assurance as to the accuracy of any information or advice given.

Any advice given by Plan Manage Assist outside of financial intermediary advice shall be considered general in nature. Plan Manage Assist shall not be liable for any failure of, or delay in the performance of this service agreement for the period that such failure or delay is;

- a. beyond the reasonable control of a party,
- b. materially affects the performance of any of its obligations under this agreement, and
- c. could not reasonably have been foreseen or provided against

Plan Manage Assist's service agreement does not negate or diminish the statutory guarantees regarding the supply of services the Participant/ nominated representative receive under The Australian Consumer Law (Competition and Consumer Act 2010-Schedule 2)

Plan Manage Assist accepts in good faith the information provided by the Participant/nominated representative to be true and accurate, and that claims presented by Plan Manage Assist are a true reflection of goods and services provided to the Participant in line with the NDIS guidelines (National Disability Insurance Scheme Act 2013).



Agreement signatures

The parties agree to the terms and conditions of this Service Agreement.

Signature of Participant/nominated Representative

Date (dd/mm/yyyy)

Signature of Participant/nominated Representative

Date (dd/mm/yyyy)

John Collins

Signature of authorised person from Plan Manage Assist

Date (dd/mm/yyyy)

Copy of participant's NDIS plan

Please attach a copy of the Participant's approved NDIS plan with your email when submitting this form, this assists us to setup your budget correctly.