



Registered NDIS Provider
(No. 4050122259)

ABN: 78 656 995 210

-  (07) 4334 0002
-  admin@hbplanmanagement.com
-  www.hbplanmanagement.com
-  Hervey Bay Plan Management

PLAN MANAGEMENT SERVICE AGREEMENT

Parties

This service agreement is between Hervey Bay Financial Solutions T/As Hervey Bay Plan Management (ABN: 78 656 995 210) and the Participant/Nominated Representative in the National Disability Insurance Scheme.

This service agreement will be in effect from today for the duration of the Participant's association with Hervey Bay Plan Management, until we are notified otherwise in writing by the Participant/Nominated Representative.

To engage the services of Hervey Bay Plan Management, upon acceptance of this Service Agreement, the Participant/Nominated Representative will provide their NDIS plan details, NDIS number and other relevant details as requested in this agreement.

www.hbplanmanagement.com

Postal Address: PO BOX 528 Hervey Bay QLD 4655

Office Address: 7/107 Boat Harbour Drive, Pialba QLD 4655

Office Hours // Monday - Thursday, 8:30am - 5:00pm | Fridays, 8.30am - 3:00pm

Schedule of Supports

Hervey Bay Plan Management agrees to provide the Participant with Plan Management - Financial Administration, provided the funds are available in the Participant's NDIS plan for Hervey Bay Plan Management to access. The supports and their prices are set out in the schedule below, with prices being dictated by the participant's plan and the NDIS price guide/support catalogue. All prices are GST exempt and include the cost of providing the support.

Support Item	Support Item Reference Number	Description	Price	Total Units
CB and Training in Plan and Financial Management by a Plan Manager	14_031_0127_8_3	Capacity building and training in plan administration and management with a participant to strengthen their ability to undertake tasks associated with the management of their supports. Providers of this support are to assist the participant to build capacity to undertake all aspects of plan administration and management, including: engaging providers; developing service agreements; maintaining records; claiming payments from the NDIA; and paying providers	As per the NDIS price guide.	As per detailed out in participant's plan
Plan Management And Financial Capacity Building – Set up Costs	14_033_0127_8_3	A one-off (per plan) establishment fee for setting up of the financial management arrangements for managing of funding of supports	As per the NDIS price guide.	As per detailed out in participant's plan
Plan Management – Financial Administration	14_034_0127_8_3	A monthly fee for the ongoing maintenance of the financial management arrangements for managing of funding of supports.	As per the NDIS price guide.	As per detailed out in participant's plan

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Rights and Obligations of Participant

The Participant/Nominated Representative agrees to:

- Take due steps to provide information as requested by Hervey Bay Plan Management in a timely manner
- Treat Hervey Bay Plan Management employees with courtesy and respect
- Discuss any concerns about our service with Hervey Bay Plan Management
- Advise Hervey Bay Plan Management immediately if the Participant's NDIS plan is suspended or replaced with a new NDIS plan or the Participant stops being a participant in the NDIS

Rights and Obligations of the Provider

Hervey Bay Plan Management agrees to:

- Provide Plan Management - Financial Administration
- Reconcile client balances
- Pay supplier invoices on behalf of the participant
- Process client reimbursement claims
- Track expenditure against client budget
- Provide monthly statements of expenditure and available funding upon request
- Provide client liaison via emails and phone calls
- Consult the Participant/Nominated Representative on request regarding decisions about how funds are spent
- Communicate openly and honestly in a timely manner
- Treat the Participant/Nominated Representative with courtesy and respect
- Listen to the Participant/Nominated Representative/s feedback and resolve problems quickly
- Protect the Participant's privacy and confidential information

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Payments

Hervey Bay Plan Management will claim directly from the NDIA an agreed monthly fee for the provision of supports as agreed in Schedule of Supports - Improved Life Choices upon acceptance of the Service Agreement.

By nominating Hervey Bay Plan Management 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 Hervey Bay Plan Management, by forwarding an invoice to admin@hbplanmanagement.com.

Participant Budgets to be Managed

The Participant/Nominated Representative will provide Hervey Bay Plan Management details of their support budgets as per the Participant's current NDIS plan.

If the support categories or budgets change, the Participant/Nominated Representative agrees any changes will be submitted immediately in writing to Hervey Bay Plan Management, signed and dated by the Participant/Nominated Representative.

Ending this Service Agreement

Should either party wish to end this agreement for any reason, notice should be given to the other party in writing at least one week prior to the agreement end date.

If either party is found to be in serious breach of this agreement, the notice period shall be waived and the agreement can be ended immediately.

Privacy

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Hervey Bay Plan Management takes the privacy of all participants very seriously. The provider takes reasonable steps to protect all personal information, which includes information collected in person or electronically, including information collected from other service providers.

Hervey Bay Plan Management abides by the requirements of the Privacy Act 1998 (Cth) (“Act”) in relation to the collection, use and disclosure of personal information and comply with other applicable laws protecting privacy including State and Territory health information legislation.

By engaging in the services of Hervey Bay Plan Management, or providing personal information to the provider, participant’s consent to Hervey Bay Plan Management collecting and storing this data, acknowledging that the provider will never provide the participant’s personal information or documentation to a third party without their consent.

The participant’s continued use of Hervey Bay Plan Management indicates that they accept the conditions of the Privacy Information and consent to the collection and use by Hervey Bay Plan Management of any personal information provided while using their services.

Feedback of Services

If the participant wishes to give feedback on the provider performance, whether it be positive or negative, the participant can phone Cassandra Patterson on 07 4334 0002 or provide feedback by email to admin@hbplanmanagement.com.

In the case of negative feedback where the issue cannot be resolved directly, the participant is urged to contact the NDIS Quality and Safeguards Commission on 1800 035 544 for further assistance.

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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 reasonable and necessary supports specified in the statement of supports 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.

Hervey Bay Plan Management will pay GST as per specified in the National Disability Insurance Scheme Act 2013 (NDIS Act).

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