



SERVICE AGREEMENT

Plan Management - Financial Administration Supports

NOTE: A service agreement can be made between a participant and a provider or a participant’s nominee and a provider. A participant’s nominee is someone close to the participant, such as a family member or friend or someone who manages the funding for supports under a participant’s NDIS plan.

This service agreement is made between the National Disability Insurance Scheme (NDIS) participant or participant's nominee and 4U Plan Managers – an NDIS registered provider.

This service agreement will commence from the signed date and is ongoing until either party notifies the other of their intention to cancel the agreement. For more details on ending this service agreement, see section 8 below.

Who is completing this service agreement?

- NDIS participant
- Participant’s nominee
- Other: _____

1. Participant Details

Name	
NDIS Number	
Date of Birth	
Email	
Contact Number	
Address	

2. The NDIS and this Service Agreement

- (a) This agreement is made according to the rules and the goals of the National Disability Insurance Scheme (NDIS).
- (b) 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. Service Provision

The team at 4U Plan Managers agree to provide the participant with the following NDIS plan management services for the duration of this service agreement:

Support	Description of Support	Price and Payment Information
Plan Management - Set up Costs (14_033_0127_8_3)	Initial consultation and set-up at the beginning of the service agreement includes: <ul style="list-style-type: none"> • Explain how NDIS plan management works • Explain and agree on the service model • Consent arrangements • Dispute Resolution • Setting up the participant in our client management and finance system • Granting access to the Careview Advantage smartphone app (if requested) • Creating a folder for the participant in our client file system Set-up at the beginning of every new NDIS plan includes: <ul style="list-style-type: none"> • Creating service bookings for plan managed budgets in NDIS myplace portal • Adding NDIS plan to our client management and finance system • Budget allocation 	One-off fee at the beginning of every NDIS plan – National \$232.35 (as of 1 July 2021)
Plan Management – Financial Administration (14_034_0127_8_3)	Ongoing monthly supports include: <ul style="list-style-type: none"> • Managing and monitoring the participant’s budget • Claiming and dispersing funds to pay provider invoices • Processing participant reimbursement claims • Delivering monthly plan management statements to participant • Troubleshooting • Providing guidance and information related to using your NDIS plan funds • Record keeping • Regular communication 	Monthly Fee – National \$104.45 (as of 1 July 2021)

4. Responsibilities of the provider

4U Plan Managers agrees to:

- (a) Treat the participant with courtesy and respect
- (b) Consult the participant on decisions about how supports are provided
- (c) Provide the service that meet the participants needs within a timely period
- (d) Review the participant's budget vs spend monthly – Monthly Statement sent to participant
- (e) Give the information about managing any complaints or disagreements and details of the provider's cancellation policy
- (f) Listen to the participant's feedback and resolve problems quickly
- (g) Pay all service provider invoices which meet the NDIS 'reasonable and necessary' legislation once approval has been given by the participant
- (h) Keep personal information private
- (i) Give the participant the required notice if the provider needs to end the service agreement (see 'Ending this Service Agreement' below for more information)
- (j) Protect the participant's privacy and confidential information
- (k) 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, and
- (l) Issue regular invoices and statements of the supports delivered to the participant.

4U Plan Managers has policies and procedures that are built on human rights. Where allegations of abuse, neglect, violence, exploitation or discrimination are made, 4U Plan Managers employs a Zero Tolerance policy.

5. Responsibilities of the Participant/Participant's Nominee

The participant/participant's nominee agrees to:

- (a) Respect the rights of staff, ensuring their workplace is safe and healthy and free from harassment
- (b) Abide by the terms of your agreement with us
- (c) Understand that your needs may change and with this, your services may need to change to meet your needs
- (d) Tell us if you have problems with the care and services you are receiving
- (e) Give us enough information to develop, deliver and review your support plan
- (f) Provide us with information that will help us better meet your needs
- (g) Provide us with a minimum of 24 hours' notice when you are unable to attend a scheduled meeting
- (h) 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

- (i) Let the provider know immediately if the participant's NDIS plan is suspended or replaced by a new NDIS plan or if the participant stops being a participant in the NDIS.

6. Fees for Service

From the start date, we will automatically invoice the NDIA for the plan management services we provide to you. Should the NDIA amend any rates associated with the 4U Plan Managers services, we will automatically update our fees in accordance with the NDIS Price Guide. No action will be required by you.

7. Changes to This Service Agreement

If changes to the supports 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 provide the other party with 14 days written 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 us feedback, the participant can talk to Brad Roberts on 0405 145 433, email brad@4uplanmanagers.com.au or use our online form at 4uplanmanagers.com.au/complaints-and-feedback.

If the participant is not happy with the provision of supports and wishes to make a complaint, the participant can talk to Brad Roberts on 0405 145 433, email brad@4uplanmanagers.com.au or use our online form at 4uplanmanagers.com.au/complaints-and-feedback.

If the participant is not satisfied or does not want to talk to this person, the participant can contact the National Disability Insurance Scheme by calling 1800 035 544, 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) 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 your NDIS plan currently in effect under section 37 of the NDIS Act;
- (b) Your NDIS plan is expected to remain in effect during the period the supports are provided; and
- (c) You will immediately notify us if your NDIS Plan is replaced by a new plan or if you stop being a participant in the NDIS.

11. Contact Details

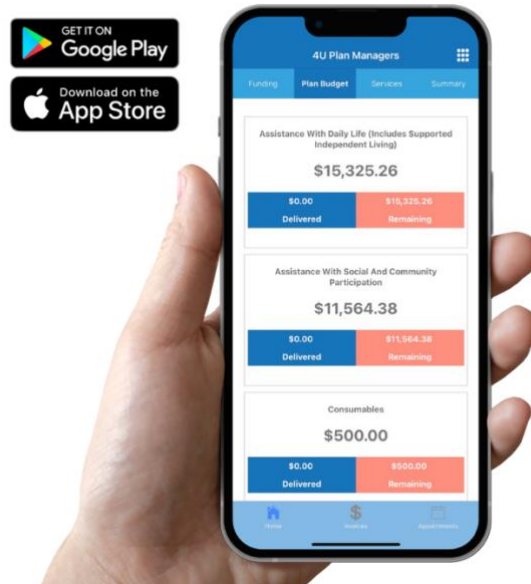
4U Plan Managers Details	
Office Address	Shop 2/433 Torrens Road, Kilkenny SA 5009
Office Number	1800 950 772
Your Designated Plan Manager	Brad Roberts
Mobile Number	0405 145 433
Email	brad@4uplanmanagers.com.au

Participant's Nominee Details	
Name	
Contact Number	
Email	
Relationship to Participant	

12. Service Model

Careview Advantage App

The Careview Advantage smartphone app allows the participant/participant's nominee to log in and view your NDIS plan budgets in real-time, receive push notifications for new invoices, approve pending invoices and see monthly expenditure summaries.



Invoice Approval

The participant/participant's nominee can request to approve provider invoices received by 4U Plan Managers before payment is made. 4U Plan Managers will seek approval via Careview Advantage App, email, text message or phone call.

Please answer the following service model questions:

1. Does the participant/participant's nominee require access to the Careview Advantage App?

- Yes
- No

2. How will invoices be approved for payment?

- 4U Plan Managers will approve all invoices on behalf of the participant.
- The participant/participant's nominee has **48 hours** to approve invoices. The invoices will automatically be approved by 4U Plan Managers after this time.
- The participant/participant's nominee has **7 days** to approve invoices. The invoices will automatically be approved by 4U Plan Managers after this time.

3. How will the participant/participant's nominee approve invoices?

- Careview Advantage App
- Email
- Text message
- Phone call

13. Agreement Signatures

The following parties agree to the terms and conditions of this service agreement.

Signature of *participant/participant's nominee*

Name of participant/participant's nominee

Date

Brad Roberts

Name of authorised person from 4U Plan Managers

Signature of authorised person from 4U Plan Managers

Date



CONSENT TO RELEASE
INFORMATION FORM

This consent form allows you, the participant or participant's nominee, to list any contacts, such as family or an NDIS support coordinator, whom 4U Plan Managers can share financial information related to your NDIS plan with.

For NDIS support coordinators only: Grant them access to the Careview Connect Portal that allows them to view your NDIS plan funding in real-time and processed invoices. This enables them to easily coordinate your NDIS supports and get the most out of your funding.

Terms & Conditions

- This form can only be completed by the participant or the authorised account nominee that has been outlined in the 4U Plan Managers service agreement.
- This form should only be completed if the participant or the 4U Plan Managers account nominee would like to provide another person access to the participant's funding information.
- When providing someone with consent, please keep in mind they will have full access to the participant's account and will be able to request the following types of information from 4U Plan Managers:
 - Details regarding purchases and from what service providers
 - Copies of processed invoices
 - Access to funding statements and other funding reports
- If the participant is aged 18 or older, they will automatically have consent and authority for their account, even if they did not sign the service agreement and had a representative/nominee complete it on their behalf.
- No one will be able to request any information from 4U Plan Managers regarding an account without a consent form completed by the participant or the 4U Plan Managers account nominee.
- Should a participant's circumstances change at any point, it is the participant's and/or 4U Plan Managers account nominee's responsibility to contact 4U Plan Managers to add or remove consent as required.
- If the participant is aged 18 or older and they should not have access to their 4U Plan Managers account, 4U Plan Managers requires a copy of legal documentation to demonstrate guardianship or relinquishing of decision making.
- Should there be a dispute between the participant and the account nominee regarding the choice and control of the account, 4U Plan Managers will follow the wishes of the participant unless the legal documentation highlighted above can be produced.

Participant Details

Name _____

NDIS Number _____

List of Parties with Consent

I, _____

(the Participant or authorised account nominee), authorise 4U Plan Managers to release information to the following parties:

Name	
Company (if applicable)	
Relationship to Participant	
Contact Number	
Email	
Access to Careview Connect Portal (NDIS support coordinators only)	<input type="checkbox"/> YES / <input type="checkbox"/> NO

Name	
Company (if applicable)	
Relationship to Participant	
Contact Number	
Email	
Access to Careview Connect Portal (NDIS support coordinators only)	<input type="checkbox"/> YES / <input type="checkbox"/> NO

I have read the terms and conditions and confirm I have the authority to complete this form.

YES NO

By signing below, I acknowledge 4U Plan Managers will now have full authority to share information with the parties named on this form. You can revoke these permissions at any time by emailing admin@4uplanmanagers.com.au.

Signature _____ Date _____