



Interactive Plan Management

Service Agreement

Parties:

This Service Agreement is between Interactive Plan Management Pty Ltd and the Participant/nominated representative in the National Disability Insurance Scheme.

Participant Name/Participants representative: _____

The Service Agreement will be in effect from today for the duration of the Participants association with Interactive Plan Management, or until we are notified in writing by the Participant/nominated representative to end this Service Agreement.

Upon acceptance of this Service Agreement, the Participant/nominated representative will provide a copy of their NDIS plan to Interactive Plan Management.

Schedule of Supports:

Interactive Plan Management agrees to provide to the Participant the services of plan management. The supports and their prices are set out in the Schedule of Supports below. All pricing are GST inclusive (if applicable) and include the cost of providing the supports.

Additional expenses (i.e. things that are not included as part of a Participants NDIS supports) are the responsibility of the Participant/nominated representative and are not included in the cost of the supports.

Responsibilities of Provider:

Interactive Plan Management agrees to;

- Provide plan management services
- Reconcile client balances
- Pay supplier invoices on behalf of clients
- Process client reimbursement claims
- Track expenditure against client budget
- Provide monthly statements of expenditure and available funding upon request
- Assist with purchases where appropriate
- Troubleshooting
- Client liaison – email, phone etc
- 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 as per Interactive Plan Management Privacy Policy



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Responsibilities of Participant/nominated representative:

I agree to:

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

Payments:

Interactive Plan Management will claim directly from the NDIS an agreed monthly fee for the provision of support as agreed in Schedule of Supports.

By nominating Interactive 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 Interactive Plan Management by forwarding an invoice to:

accounts@interactiveplanmanagement.com.au

Changes to this Service Agreement:

If changes are required to be made to this Service Agreement, 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 both Parties.

Ending this Service Agreement:

Should either Party wish to end this Service Agreement they must give one month's 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 provide feedback, or is not satisfied with the provision of supports and wishes to make a complaint, the Participant/nominated representative can contact Danielle Mathie at Interactive Plan Management on 0434 619 017 or email admin@interactiveplanmanagement.com.au



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 Participants NDIS plan currently in effect under section 37 of the NDIS Act;
- Interactive Plan Management will pay GST as per specified in the National Disability Insurance Scheme Act 2013 (NDIS Act).

Contact and Banking Details:

The Participant/nominee representative will provide bank details, if necessary, to Interactive Plan Management for reimbursement.

Schedule of Supports – Improved Life Choices:

Support	Description of Support	Price and Payment Information
Financial Intermediary Set-up Costs (26003) (14_033_0127_8_3)	Setting up client details into client management system Setting up client account within finance system Setting up service and budget allocation	\$218.27 Set-up fee
Financial Intermediary monthly processing (14_033_0127_8_3)	Reconciling client balances Paying supplier invoices on behalf of the client Processing client reimbursement claims Tracking expenditure against client budget Monthly statements of expenditure and available funding Assisting with purchasing Troubleshooting Client Liaison – emails, phone calls etc	\$98.12 per month x 12 = \$1,177.44
	TOTAL	\$1,395.71
Plan Management Activities	Setting up and undertaking regular liaison with providers and monitoring support provision.	\$54.13 per hour

Please note any changes will be in accordance with the NDIA pricing guide.



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Contact Details:

The Participant/nominated representative can be contacted on:

Contact Name: _____

Phone (W): _____

Phone (H): _____

Mobile: _____

Email: _____

Address: _____

Alternative Contact Person: _____

The provider can be contacted on:

Contact Name: Danielle Mathie _____

Phone: 0434 619 017 _____

Email: admin@interactiveplanmanagement.com.au _____

Address: PO Box 2082 Elizabeth Park SA 5113 _____

Service Agreement Signatures:

Signature of Participant/nominated
representative

Name of Participant/nominated representative

Date

Signature of authorised staff member from
Interactive Plan Management

Name of authorised staff member from
Interactive Plan Management Pty Ltd

Date