

NDIS PLAN MANAGEMENT SERVICE AGREEMENT

(Registration Group 0127 – Plan Management Services)

1. PARTIES TO THIS AGREEMENT

This Service Agreement is made between:

Provider

BUSINESS NAME

Plan Wise Community Partners

ABN

68 655 766 448

ADDRESS

8 White Cedar Drive, Castle Hill NSW 2154

EMAIL

admin@lgpartners.com.au

PHONE

0498475578

Participant

PARTICIPANT FULL NAME *

NDIS NUMBER *

PARTICIPANT ADDRESS *

NOMINEE / PLAN NOMINEE (IF APPLICABLE)

2. PURPOSE OF THIS AGREEMENT

This agreement outlines the Plan Management services provided by us to assist you in managing your NDIS funding.

We act as your financial intermediary to:

- Pay providers on your behalf
- Monitor your NDIS budget
- Provide regular financial statements
- Ensure invoices are processed correctly under NDIS rules

We do not provide disability supports directly.

3. SERVICES WE WILL PROVIDE

We will:

- Receive and process invoices from your support providers
- Check invoices for NDIS compliance before payment

- Pay approved invoices using your NDIS plan funds
- Monitor your budget and spending
- Provide monthly (or agreed frequency) statements
- Assist with queries relating to budget and funding
- Liaise with providers regarding invoice issues

4. YOUR RESPONSIBILITIES (PARTICIPANT)

You agree to:

- Provide accurate details of your NDIS plan
- Ensure providers send invoices directly to us
- Inform us of any changes in your plan or supports
- Check your monthly statements and notify us of concerns
- Ensure supports claimed are delivered as agreed with providers

5. OUR RESPONSIBILITIES (PROVIDER)

We agree to:

- Manage your NDIS funds in accordance with NDIS rules
- Process invoices in a timely and accurate manner
- Maintain confidentiality of your personal and financial information
- Keep accurate financial records
- Provide clear budget reporting
- Act in your best interests at all times

6. FEES FOR SERVICE

Plan management services are funded directly by the NDIS under your plan.

- You will not be charged directly for plan management services
- We claim fees directly from your NDIS plan in line with the current NDIS Pricing Arrangements

7. INVOICING PROCESS

Providers must send invoices to:

 admin@lgpartners.com.au

Invoices must include:

- Participant name and NDIS number

- Service details and dates
- Correct NDIS line item
- Provider ABN

We will:

- Verify invoices against your plan
- Process payment if compliant
- Contact providers if clarification is needed

8. PRIVACY & CONFIDENTIALITY

We will:

- Protect your personal and financial information
- Store data securely
- Only share information with your consent or when required by law

Your information will be handled in accordance with the Privacy Act 1988 (Cth).

9. COMPLAINTS

If you are unhappy with our services, you can contact us:

 contact@lgpartners.com.au

 0498475578

We will:

- Acknowledge complaints within [2–5 business days]
- Investigate and respond promptly
- Maintain a complaints register

You may also contact the NDIS Quality and Safeguards Commission if needed.

10. INCIDENT MANAGEMENT

We will manage and document any incidents related to:

- Financial errors
- Invoice disputes
- Data breaches

Serious matters will be escalated in line with NDIS requirements.

11. TERMINATION OF AGREEMENT

This agreement can be ended by either party with 14 days written notice.

We may terminate immediately if:

- Required by law
- There is misuse of services or fraudulent activity

Upon termination, we will:

- Provide final statements
- Transfer relevant information securely if required

12. COMMUNICATION

Preferred method of communication:

☐ Email

☐ Phone

☐ SMS

☐ Other

13. AGREEMENT REVIEW

This agreement will be reviewed:

- Every 12 months, OR
- When your NDIS plan changes, OR
- When requested by either party

14. CONSENT

By signing below, you agree to this Service Agreement.

PARTICIPANT / NOMINEE SIGNATURE

PRINT FULL NAME *

SIGNATURE DRAWING *

DATE SIGNED

PROVIDER REPRESENTATIVE

REPRESENTATIVE NAME

Plan Wise Community Partners

REPRESENTATIVE SIGNATURE

PWCommunity Partners

