



NDIS Plan Management Service Agreement

USEA Business Advisory Pty Ltd Trading as: USEA Plan Managers

ABN: 68 647 102 154

NDIS Provider Number: 4050 107 797

Phone: (08) 9904 7685

Email: ndis@usea.com.au

Service Agreement

This agreement has been produced for Participants to use when entering into a Service Agreement with USEA Plan Managers.

Parties

This service agreement is for a Participant in the National Disability Insurance Scheme and is made between:

U SEA Business Advisory Pty Ltd – trading as: USEA Plan Managers
ABN: 68 647 102 154 - Provider Number: 4050 107 797

Participant Details

Full Name	
NDIS Number	
Date of Birth	
Gender (male, female, non-binary)	
Phone Number	
Email	
Address	
Primary Disability	

Bank Account Details (for reimbursements)

Account Name	
BSB	
Account Number	

Plan Nominee Details (if client is not primary decision maker)

Nominee Name	
Relationship to Participant	
Phone Number	
Email	
Alternative Contact (if applicable) Name, number, email	

Authority to Obtain and Release Information

I hereby authorise USEA Plan Managers, and all PRODA registered USEA Plan Managers employees, to act on my behalf, to obtain and release information from the National Disability Insurance Agency and their representatives. I hereby authorise USEA Plan Managers to obtain and release information from the following person / organisations listed below in relation to the provision of the above services. This authority remains valid until I no longer receive assistance from USEA Plan Managers, however I am aware I can change or cancel this authority at any time.

Name of Person/Organisation	Relationship to Participant	Phone	Email Address
NDIS		1800 800 110	enquiries@ndis.gov.au
	Support Coordinator		

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.

The NDIS and this Service Agreement

This Service Agreement is made for the purpose of providing services described below under the Participant's National Disability Insurance Scheme (NDIS) plan.

The Participant or their Nominee consents to USEA Plan Managers having access to view their NDIS plan on the NDIS portal for the purpose of providing the services described here within.

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 support.

Ongoing Agreement

This agreement will be perpetual and ongoing and will cover the current and any future NDIS plans allocated to the Participant.

To minimise disruption to service during any plan change over period USEA Plan Managers will monitor the NDIS Portal for new plans and will then set up the new plan and budgets on the Portal and USEA Plan Managers systems to allow us to continue to provide Plan Management services.

The Parties agree to continue this agreement until either party gives 14 days' notice in writing.

Plan Management Charges

USEA Plan Managers agrees to provide Plan Management services for the period of this contract utilising your Choice & Control budget. The Choice & Control budget set out in your NDIS plan has been allocated for Plan Management services only and is provided in addition to the funds allocated to pay for your other supports. Increases or decreases to Plan Management fees will be applied in line with NDIS as outlined in the official Price Guide.

Once we receive a signed copy of this agreement and have been endorsed with the NDIA as your nominated plan manager, USEA Plan Managers will invoice the NDIA for Plan Management services from the day of endorsement, all future fees will be automatically deducted on the relevant day each month. USEA Plan Managers will regularly check your satisfaction with USEA Plan Managers service provision. USEA Plan Managers will not exceed the total monthly amount as outlined in the NDIS price guide.

Additional expenses (i.e., that are not included as part of a Participant's NDIS support) are the responsibility of the Participant or Nominee and are not included in the cost of the supports.

Correspondence and Invoicing Requirements

To ensure correspondence is received and processed promptly, all correspondence must be sent to the appropriate email address as follows:

Service Invoices: ndis.invoices@usea.com.au

Quotes, Reimbursements, service agreements, other general queries and correspondence: ndis@usea.com.au

The invoice email address is used solely for the receipt and processing of invoices and is not monitored for general correspondence or enquiries.

It is the Service Provider's responsibility to ensure correspondence is sent to the correct email address. Correspondence sent to an incorrect email address may not be identified or actioned and may result in delays to payment, processing, responses or other administrative matters.

The Organisation accepts no responsibility for delays arising from correspondence being submitted to an incorrect email address.

Electronic Invoice Transfer and Reading

In order to provide an efficient service, USEA Plan Managers utilises automated electronic transfer and invoice reading software and therefore cannot accept handwritten invoices. All invoices must be electronically prepared and submitted in a format that can be electronically read and processed by our system.

USEA Plan Managers can provide Service Providers with a sample invoice layout in Microsoft Word format, if required, to assist with preparing invoices that meet our processing requirements. However, the completed invoice must be converted to and submitted in PDF format.

Invoices submitted in handwritten form, or in formats other than PDF, will not be recognised or processed by our automated system which may result in delays to payment.

The Service Provider is responsible for ensuring that invoices are submitted in the required format and contain all necessary information before submission.

Responsibilities of USEA Plan Managers

- protect the Participant's privacy and confidential information in accordance with USEA Plan Managers privacy policies.
- communicate openly and honestly in a timely manner.
- treat the Participant with courtesy and respect.
- consult the Participant on decisions about how supports are provided.
- provide Plan Management services that meet the Participant's needs and are in accordance with service descriptions as per the NDIS Price Guide and 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 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 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 Participant / Participant's Nominee

- inform USEA Plan Managers about how they wish the supports to be delivered to meet the Participant's needs
- treat USEA Plan Managers with courtesy and respect and to discuss with USEA Plan Managers any concerns about the support being provided adhere to the agreed timeframes for the review and approval of submitted invoices and/or timesheets
- give USEA Plan Managers the required notice if you wish to end the Service Agreement (see 'Ending this Service Agreement' below for more information), and
- let USEA Plan Managers know immediately if your NDIS plan is suspended or replaced by a new NDIS plan, or you stop being a Participant in the NDIS.
- provide electronic invoices (not handwritten).

Managing your Budget

- We endeavor to assist you with budgeting and provide regular reporting on your spending via the USEA Plan Managers web app & our monthly report emails. However, as the participant/nominee, it is your responsibility to ensure spending is within the budgets outlined in your NDIS plan.
- If we receive an invoice that is unable to be claimed, due to insufficient funding remaining in your NDIS plan, we will endeavor to inform both yourself and the provider of the unsuccessful claim. You will then need to make alternative payment arrangements between yourself and the provider for the invoice.

Ending this Service Agreement

Should either Party wish to end this Service Agreement they must give 14 days' notice in writing. If either Party seriously breaches this Service Agreement the requirement of notice will be waived.

Feedback, complaints, and disputes

USEA Plan Managers welcomes your feedback and has a complaint policy to ensure that your concerns are addressed, and we continually improve our level of customer satisfaction.

If you wish to give USEA Plan Managers feedback, you can contact us on (08) 9904 7685 or via email ndis@usea.com.au

If your complaint or dispute is not resolved to your satisfaction you can contact the NDIS

Quality and Safeguards Commission by calling 1800 035 544, visiting one of their offices in person, or visiting www.ndiscommission.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;
- Your NDIS plan is expected to remain in effect during the period the supports are provided; and
- You will immediately notify USEA Plan Managers if the NDIS Plan is replaced by a new plan, or you stop being a Participant in the NDIS.

Privacy

As part of providing services to you, USEA Plan Managers may be required to gather some of your personal information. You will only be asked for information that is necessary for us to provide services to you.

At times, USEA Plan Managers may engage offshore contracted third parties for the purposes of systems and software troubleshooting. This work will not involve the use of protected information, and we make every effort to de-identify this data and are held accountable to the highest privacy standards.

Information will only be released to parties for whom you have given consent through this agreement and at any time you can amend or withdraw this consent. USEA Plan Managers has established privacy policies and procedures to ensure your personal information will be treated confidentially, in accordance with the Information Privacy Act and related Australian Privacy Principles (1988).

Beyond these systems activities, your personal information will not be released to any party without your consent, with the exception of situations where:

- It is required by the law
- A USEA Plan Managers staff member believes there is an imminent risk to yourself or another party

Agreement signatures

The Parties agree to the terms and conditions set out on this Service Agreement.

Participant Name	
Nominee /Guardian Name (if applicable)	
Signature	
Date	
Plan Manager Name	Victor Theo
Plan Manager signature	
Date	

Schedule of Supports

Support Item	Description of Support	Price Limit
Plan Management – Financial Administration Support (14_034_0127_8_3)	A monthly fee for the ongoing maintenance of the financial management arrangements.	\$104.45*per month *Fees may vary from time to time be stay in line with the NDIS Pricing Arrangements and Price Limits and/or other documents or publications issued by the NDIA.