



NDIS Plan Management Participant Service Agreement

This agreement has been produced for Participants to use when entering into a Service Agreement with Plan Tracker Pty Ltd.

We look forward to hearing from you to discuss your individual needs and how we can best assist you to meet your goals.

Plan Tracker Pty Ltd
ABN 69615948019

Phone 1800 549 670
Email hello@plantracker.com.au

National Disability Insurance Scheme Participant Service Agreement

This agreement has been produced for Participants to use when entering into a Service Agreement with Plan Tracker Pty Ltd.

Parties & Amounts

This Service Agreement is for	
a Participant in the National Disability Insurance Scheme (Participant), and is made between:	
Provider Name (Trading As)	Plan Tracker
Participant Name	
Date of Birth	
NDIA Participant Number	
Nominee Name	
NDIA Plan Dates	
Improved Life Choices budget (plan management)	

Participant/Nominee Contact details

Participant/Nominee Name			
Phone		Mobile	
Email			
Address			
Alternative Contact Person			

Authority to Obtain and Release Information

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

Name of Person/Organisation	Relationship to Participant	Contact Details
NDIS		1800 800 110

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 Plan Tracker 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 supports.

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 Plan Tracker will monitor the NDIS Portal for new plans and will then setup the new plan and budgets on the Portal and Plan Tracker 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

Plan Tracker agrees to provide Plan Management services for the period of this contract utilising your Improved Life Choices budget. The budget set out for Improved Life Choices in your NDIS plan has been allocated for Plan Management services and is provided in addition to the funds allocated to pay for your other supports. Increases to Plan Management fees will be applied inline with NDIS increases outlined in the official Price Guide.

Once we receive a signed copy of this agreement, Plan Tracker will automatically invoice the NDIA for Plan Management services on a monthly basis. Plan Tracker will regularly check your satisfaction with Plan Tracker service provision. Plan Tracker will not exceed the total amount as outlined in the above section.

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

Electronic Invoice Reading

In order to provide an efficient service, Plan Tracker utilises automated invoice reading and therefore can not accept hand written invoices. Plan Tracker can provide a sample invoice layout in Microsoft Word, if required.

Responsibilities of Plan Tracker

- protect the Participant's privacy and confidential information in accordance with Plan Tracker 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
- review the provision of supports with the Participant at least every 3 months
- 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 Plan Tracker about how they wish the supports to be delivered to meet the Participant's needs
- treat Plan Tracker with courtesy and respect and to discuss with Plan Tracker any concerns about the supports being provided adhere to the agreed timeframes for the review and approval of submitted invoices and/or timesheets
- give Plan Tracker the required notice if you wish to end the Service Agreement (see 'Ending this Service Agreement' below for more information), and
- let Plan Tracker 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. In order to provide an efficient service, Plan Tracker utilises automated invoice reading and therefore can not accept handwritten invoices. Plan Tracker can provide a sample invoice layout in Microsoft Word, if required.

Managing your Budget

- We endeavour to assist you with budgeting and provide regular reporting on your spending via the Plan Tracker app & our week-at-a-glance 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.

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.

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

Plan Tracker 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 Plan Tracker feedback, you can contact us on 0478142314 or via email hello@plantracker.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 Plan Tracker 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, Plan Tracker 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, Plan Tracker may engage offshore contracted third parties for the purposes of systems and software troubleshooting. While this work may involve the use of protected information, we make every effort to de-identify this data wherever possible 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. Plan Tracker 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 Plan Tracker staff member believes there is an imminent risk to yourself or another party

Plan Tracker can be contacted on:

Contact Name: Plan Tracker Customer Care Team

Phone: 1800 549 670

Email: hello@plantracker.com.au

Head Office PO Box 92, GOSFORD NSW 2250

Agreement signatures

The Parties agree to the terms and conditions of this Service Agreement.

Name of Participant or Nominee	
	Signature:
	Date:
Name of Authorised Person from Plan Tracker	Elisa James
	Signature:
	Date: