

# NDIS Plan Management Service Agreement



Registered NDIS Provider

## Parties to the Agreement

This Service Agreement is made between:

- You, the NDIS Participant or your Authorised Representative, and
- Essential Plan Services Pty Ltd, trading as Essential Plan Support Services (EPSS).

This Agreement outlines the terms, conditions, rights, and responsibilities related to EPSS providing Plan Management services under the National Disability Insurance Scheme (NDIS). It becomes effective upon your signature or digital acceptance and remains in effect until terminated in accordance with **Clause 7: Termination of Agreement**.

## EPSS Contact Details

If you have any questions regarding this Plan Management Service Agreement, or for more information, please contact EPSS.

[admin@essentialplan.com.au](mailto:admin@essentialplan.com.au)  
0474 329 544

## Participant Details

First Name			Preferred Name (optional)	
Last Name			Date of Birth	
Gender Identity	M	F	Other:	
Preferred Pronouns (optional)			Cultural Information	
Email			Languages Spoken	
Phone Number				
Residential Address	Street			Other essential information (Health conditions, Allergies, Behaviour, etc)
	Suburb			
	State			
	Postcode			
Mode of Contact Preferred	Email	Call	Text	

## Authorised Representative

Does the participant have an Authorised Representative*	Yes	No	*An immediate parent/guardian, a person appointed by the NDIA as a Plan Nominee or a Third-Party legally appointed Guardian.	
First Name				
Last Name				
Email			Phone Number	
Residential Address	Street			Relationship
	Suburb			
	State			
	Postcode			Description of Relationship
				Immediate Parent/Guardian
				A person appointed by the NDIA as a Plan Nominee
				Third-Party legally appointed Guardian

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## NDIS Plan – Please provide a copy of your Plan

Your NDIS Number			
Plan start date		Plan end date	
Is this your first plan?	Yes	No	
<p><b>**Plan Extension</b> - To ensure continuity of service, where a plan is automatically extended by the National Disability Insurance Agency (NDIA), this agreement remains in effect in line with the extended period. Any service bookings made by Essential Plan Support Services will be amended accordingly.</p>			
How did you find us?	Support Coordinator	LAC or Planner	Google Clickability
	NDIS Provider Directory	A Friend	A service provider (not support coordinator)
	Facebook page/ad	Facebook Group	My Community Directory
	Another NDIS Participant	Other (please specify):	

## Support Coordinator/ Psychosocial Recovery Coach Details

Please provide the name and contact details of the Support Coordinator or Recovery Coach (including the organisation they work for) with whom Essential Plan Support Services is authorised to share relevant information. This supports the delivery of plan management services under the Service Agreement with the Participant or Authorised Representative.

If a new Support Coordinator or Recovery Coach is appointed within the same organisation, this consent to share information will remain valid unless advised otherwise.

Name		Phone Number	
Company			
Email			

## Bank Details (for reimbursements)

Account Name			
BSB		Account No.	

# Terms and Conditions

## 1. Description of Supports

EPSS will provide:

- Timely invoice processing and provider payments.
- Access to a user-friendly plan management portal that provides real-time updates on budget balances and downloadable copies of paid invoices.
- Monthly financial statements to help you track your spending and plan usage.
- Guidance on making NDIS claims and using your funds effectively, within the scope of a plan manager's role.
- Compliance with the NDIS Act 2013 and the NDIS Guidelines including the NDIS Pricing Arrangements and Price Limits (PAPL).

All EPSS fees are charged in accordance with the PAPL.

## 2. Your Responsibilities

You agree to:

- Treat EPSS staff respectfully.
- Use NDIS funds in line with your NDIS Plan and the NDIS Act.
- Monitor your budget using EPSS-provided tools.
- Provide valid documentation for invoices and reimbursement claims.
- Notify EPSS of any changes to your NDIS Plan (suspension, replacement, or exit).
- Avoid conduct that could mislead, breach legislation, or risk EPSS's safety or reputation.

## 3. EPSS Responsibilities

EPSS agrees to:

- Act professionally and respectfully.
- Provide accurate budget updates and transparent records.
- Manage provider claims efficiently and lawfully.
- Manage conflicts of interest appropriately.
- Address concerns fairly and promptly.

## 4. Invoice & Reimbursement Processing

An invoice will be processed, provided:

- The spending aligns with your plan.
- The invoice is in your name (not EPSS).
- It complies with both NDIS and Australian Taxation office (ATO) requirements.

## 5. Funding Balances and Overspending

EPSS will provide you regular updates on your funding balances through your monthly statements and the plan management portal.

However, you are ultimately responsible for monitoring your budget.

Any overspending or ineligible claims remain your responsibility.

## 6. Limitation of Liability

While EPSS is committed to delivering services with diligence and care, we are not liable for:

- Any misuse or mismanagement of NDIS funds by the Participant or third parties.
- Delays in processing caused by incomplete, inaccurate, or missing documentation.
- The conduct, performance, or outcomes of services provided by third-party providers.

Our liability is limited to the maximum extent permitted under applicable law.

## 7. Termination of Agreement

- **Effective Period:** This Agreement remains in effect until terminated by either party.
- **Termination:** Either party may terminate the Agreement with five (5) business days' written notice.
- **Immediate termination may occur in the event of:**
  - o Material breach of the Agreement.
  - o Misconduct.
  - o Loss of NDIS eligibility.

## 8. NDIS Code of Conduct

EPSS and its staff are committed to:

- Delivering services safely, respectfully, and competently.
- Preventing and responding to violence, abuse, neglect, and exploitation.

## Terms and Conditions cont.

### 9. Participant Rights and Advocacy

As a participant, you have the right to:

- Be treated with dignity and respect.
- Engage an advocate or support person.
- Provide feedback or lodge complaints without fear of reprisal.

### 10. Complaints and Feedback

We welcome your feedback and are committed to resolving any concerns promptly and fairly. If you are dissatisfied with our services, you can contact us via:

- Phone: 0498 354 750
- Email: [cathy@essentialplan.com.au](mailto:cathy@essentialplan.com.au)
- Online: [www.essentialplan.com.au](http://www.essentialplan.com.au)

You may submit feedback anonymously.

If your concerns remain unresolved, you may contact the NDIS Quality and Safeguards Commission:

- Phone 1800 035 544
- Online: [www.ndiscommission.gov.au](http://www.ndiscommission.gov.au)

### 11. Privacy and Confidentiality

EPSS complies with the Privacy Act 1988 (Cth) and NDIS Practice Standards. We:

- Only collect information required for service delivery.
- Securely store data.
- Do not share information without your consent unless required by law.

### 12. Authorisation

By signing or electronically accepting this Agreement, you confirm:

- You understand and accept to all terms.
- You are the participant or an authorised representative under the NDIS.

## Signature

Signature			
Name		Date	
Relationship to Participant (if applicable) [Parent Representative/Plan Nominee/Legal Guardian]:			