

EPSS Plan Management Service Agreement



Registered NDIS Provider

Parties to this Agreement

This Agreement is made between:

Essential Plan Services Pty Ltd, trading as **Essential Plan Support Services (EPSS)**, and the NDIS participant named in this Agreement, or where applicable, their NDIS plan nominee or child representative (together referred to as "you" throughout this Agreement).

A plan nominee is a person formally appointed by the NDIA to act on behalf of a participant aged 18 or over who is unable to make decisions about their NDIS plan independently. A child representative is a person — typically a parent with parental responsibility — who acts on behalf of a participant under 18.

This Agreement outlines the terms, conditions, rights, and responsibilities for plan management services provided by EPSS under the NDIS. It supports your choice and control in how your supports are managed.

This Agreement is a contract under Australian Consumer Law and both parties have rights and obligations under that law.

This Agreement becomes effective upon your signature or digital acceptance and remains in effect until ended in accordance with **Clause 9 (Term and Termination)**.

What plan management means with EPSS

EPSS provides plan management — the financial administration of your NDIS plan.

Plan management is a financial administration service. It does not include approving, coordinating, or recommending supports.

EPSS does not decide what can be funded or claimed — those decisions are made by the NDIS.

- Providers send invoices to EPSS
- EPSS reviews invoices against your NDIS plan and NDIS requirements
- Claims are submitted to the NDIS
- The NDIS processes the claim and releases funds
- Once funds are released, EPSS makes payment to your provider within 1–2 business days

Reimbursement claims follow the same process.

Payment timeframes may vary depending on NDIS processing times — this stage is outside EPSS's control.

Participant Details			
First Name			Preferred Name (optional)
Last Name			Date of Birth
Gender Identity	M	F	Other:
Preferred Pronouns (optional)			Country of Birth
Email			Cultural Information
Phone Number			Languages Spoken
Residential Address	Street		
	Suburb		
	State		
	Postcode		
Mode of Contact Preferred	Email	Call	Text

Plan Nominee or Child Representative (if applicable)				
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	Immediate Parent/Guardian
	Suburb			A person appointed by the NDIA as a Plan Nominee
	State			Third-Party legally appointed Guardian
	Postcode		Description of Relationship	

NDIS Plan Information				
Your NDIS Number				
Plan start date		Plan end date		
Is this your first plan?	Yes	No		
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 / Recovery Coach (if applicable)		
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
Organisation		
Email		

Bank Details (for reimbursements)		
Account Name		
BSB	Account No.	

Terms and Conditions

1. What EPSS provides

EPSS provides:

- Invoice processing and provider payments in line with your NDIS plan and NDIS requirements
- Access to a plan management dashboard showing funding balances and submitted invoices by EPSS
- Monthly statements to help you track your funding
- Clear, consistent information about invoice processing and the claims process
- Guidance on making NDIS claims and using your funds effectively, within the scope of a plan manager's role

Payments are made once funds are released by the NDIS. EPSS complies with the NDIS Act 2013 and associated NDIS guidelines in delivering plan management services.

2. Fees

EPSS charges a monthly plan management fee in line with the NDIS Pricing Arrangements and Price Limits. The current fee is set out in the NDIS Pricing Arrangements and Price Limits, available at [ndis.gov.au](https://www.ndis.gov.au). Any changes will be reflected in your monthly statements.

The fee is claimed directly from your NDIS plan's plan management funding category. You do not pay this fee out of pocket.

All fees are GST-inclusive where GST applies.

3. Your responsibilities

You are responsible for:

- Treating EPSS staff with respect
- Using your NDIS funding in line with your NDIS plan and NDIS requirements
- Ensuring supports you engage are appropriate and in line with your NDIS plan
- Making decisions about the supports you choose to use
- Understanding that EPSS does not determine whether supports are claimable
- Checking your funding balances regularly
- Providing valid invoices and receipts for claims and reimbursements
- Letting EPSS know about any changes to your NDIS plan — including a new plan issued following a review, plan suspension, or exit from the NDIS
- Providing accurate and complete information to support invoice processing
- Acting in good faith and in line with NDIS requirements

4. EPSS responsibilities

EPSS is responsible for:

- Acting professionally and respectfully
- Providing clear and accurate information about your funding and the claims process
- Applying your NDIS plan and NDIS requirements when processing invoices and submitting claims
- Maintaining accurate records and providing transparency
- Managing conflicts of interest appropriately
- Responding to questions and concerns in a timely and fair manner
- Providing services in a way that upholds your rights under the NDIS

EPSS only provides plan management services. EPSS does not provide other NDIS supports, which avoids conflicts of interest in how invoices are processed.

5. Invoice and reimbursement processing

You can choose how invoices are handled:

- **Automatic processing** — invoices are submitted once received, provided they meet requirements
- **Approve first** — invoices are held for your approval before submission

Your preference will be recorded and applied to your plan management. You can change your preference at any time by contacting EPSS.

Claims can only be submitted for supports and services after they have been provided.

An invoice can be processed when:

- It is in line with your NDIS plan and NDIS requirements
- It is made out in the participant's name (not EPSS)
- It meets NDIS and Australian Taxation Office (ATO) requirements
- Sufficient funding is available

Where an invoice meets requirements, EPSS will validate and submit the claim to the NDIS within five business days of receipt. In practice, EPSS often submits within 1–2 business days.

Reimbursements can be processed when valid receipts and proof of payment are provided.

If a claim is later assessed by the NDIS to be non-compliant, the NDIS may require repayment of funds. If the NDIS requires funds to be repaid, EPSS is not responsible for that repayment. You are responsible for ensuring supports are in line with your NDIS plan and NDIS requirements before they are used.

Terms and Conditions cont.

6. Funding balances and overspending

EPSS provides funding information through monthly statements and the plan management dashboard. Funding balances reflect your NDIS plan, and claims that have been processed.

What this means in practice:

Funding balances may not reflect supports that have been delivered but not yet invoiced, or supports you have arranged that have not yet been claimed. Because EPSS is not aware of all supports you have arranged or received, your available balance may not reflect all of your spending.

You are responsible for managing your funding and ensuring sufficient funds are available before supports are used. EPSS cannot guarantee that sufficient funds will be available at the time a claim is processed.

Any overspending or ineligible claims remain your responsibility.

7. Endorsement (PACE plans)

Most NDIS plans are now managed through the PACE system. If your plan is in PACE, EPSS must be endorsed as both *My Provider* and *My Plan Manager* before we can access your funding, submit claims, or make payments. Without endorsement, invoices cannot be processed.

If endorsement has not been completed, contact the NDIS on **1800 800 110** or via the NDIS webchat. For the details you'll need to provide, refer to the Participants page at essentialplan.com.au or contact EPSS directly.

8. Limitation of liability

EPSS provides services with care and diligence. EPSS is not responsible for:

- How your NDIS funding is used by you or third parties
- Delays caused by missing, incomplete, or incorrect information
- NDIS decisions on claim processing or compliance
- The services provided by third-party providers

Liability is limited to the maximum extent permitted by law.

9. Term and Termination

This Agreement remains in effect until ended in accordance with this clause.

Either party may end this Agreement with fourteen (14) days' written notice.

You may choose to change plan managers at any time.

This Agreement may be ended immediately if:

- There is a serious breach of the Agreement
- There is misconduct
- You are no longer eligible for the NDIS

What happens when this Agreement ends:

- While EPSS remains engaged as plan manager through to the end-of-service date, we will continue processing valid invoices in line with standard requirements. After this date, invoices will be the responsibility of your new plan manager.
- Ending this Agreement does not affect amounts already incurred or claims already submitted.
- EPSS will assist with a reasonable handover to your new plan manager, including providing relevant records on request.

To avoid disruption to your NDIS supports:

Plan Continuation — This Agreement continues if the NDIA continues your plan.

New Plans — This Agreement continues if the NDIA issues you a new plan.

10. Your rights and advocacy

You have the right to:

- Be treated with dignity and respect
- Exercise choice and control over your supports
- Make your own decisions about your supports
- Engage an advocate or support person
- Provide feedback or make a complaint without negative consequences

11. Complaints and feedback

EPSS welcomes feedback and works to resolve concerns in a timely and fair way. You can make a complaint at any time — there are no negative consequences for doing so. You may also submit feedback anonymously.

EPSS will acknowledge complaints within 2 business days. We aim to provide an outcome within 21 days, though some complaints may be resolved sooner, and complex matters may take longer — in which case we will keep you informed of progress.

Contact EPSS:

Phone: 0474 329 544

Email: admin@essentialplan.com.au

Web: essentialplan.com.au

If you are not satisfied with the outcome, or with how the complaint has been handled, you can contact the NDIS Quality and Safeguards Commission:

Phone: 1800 035 544

Web: ndiscommission.gov.au

Terms and Conditions cont.

12. Privacy and confidentiality

EPSS complies with the Privacy Act 1988 and NDIS Practice Standards.

EPSS:

- Only collects information required to provide plan management services
- Stores information securely
- Uses information only for the purpose of delivering services
- May share information with the NDIA, Support Coordinators, Recovery Coaches, and relevant providers where reasonably required to deliver plan management services
- May reasonably rely on other documentation demonstrating your authority to share information where obtaining a separate EPSS Consent to Share form is not reasonably practicable. *Examples may include NDIA documentation, Support Coordinator service agreements, referral documentation, email handover confirmations, or other written authority from you.*
- Does not share information without your authority unless required or authorised by law

You can ask how your information is used at any time — see Clause 11 for contact details.

13. NDIS Code of Conduct

EPSS complies with the NDIS Code of Conduct and is committed to:

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

14. Records

EPSS keeps records of invoices, claims, payments, and communications relating to your plan management for at least seven (7) years after the end of this Agreement, in line with NDIS and Australian Taxation Office requirements. For child participants, records are kept until the participant turns 25. You can ask EPSS for a copy of your records at any time. EPSS will provide them within a reasonable timeframe and at no cost.

15. Authorisation

By signing or digitally accepting this Agreement, you confirm that:

- You understand and agree to the terms of this Agreement
- You have had the opportunity to ask questions and seek clarification before agreeing
- You are the participant, or a plan nominee or child representative who is formally recognised under the NDIS
- You are entering this Agreement freely and understand you can seek independent advice before doing so

Signature

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