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 8 (Term and Termination)**.

Participant Details				
First Name			Preferred Name (optional)	
Last Name			Date of Birth	
Gender Identity	☐ M ☐ F *Other:* ☐		Country of Birth	
Preferred Pronouns (optional)			Cultural Information	
Email			Languages Spoken	
Phone Number			Mode of Contact Preferred	Email ☐ Call ☐ Text ☐
Residential Address	Street		Suburb	
	State		Postcode	
Other essential information *(Health conditions, Behaviour, etc).This information helps us communicate with you and provide plan management services.*				

Plan Nominee or Child Representative (if applicable)			
Does the participant have an Authorised Representative	☐ Yes ☐ No	*A person recorded with the NDIA as the participant's plan nominee, or a child representative for a participant under 18.*	
First Name		Last Name	
Email		Phone Number	
Residential Address	Street	Suburb	
	State	Postcode	
NDIS status	Child representative (participant under 18) ☐	Plan nominee appointed by the NDIA ☐	
Relationship to participant (e.g. parent, guardian, sibling, friend)			

Essential Plan SUPPORT SERVICES

Registered NDIS Provider

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.	

Essential Plan SUPPORT SERVICES

Registered NDIS Provider

Terms and Conditions

1. What EPSS provides

Plan management is a financial administration service. EPSS manages the financial side of your NDIS plan — reviewing invoices, submitting claims to the NDIS, and paying your providers.

EPSS does not:

- Decide what can be funded or claimed — those decisions are made by the NDIS
- Approve, recommend, coordinate or implement your supports
- Prepare or amend provider invoices

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
- 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

In delivering these services, 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

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

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

2. Fees

EPSS charges a monthly plan management fee, set in line with the NDIS Pricing Arrangements and Price Limits published at 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. Invoice and reimbursement processing

How your invoices are handled

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.

What EPSS checks

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 in the funding period covering the date of service

Where EPSS has not previously paid a provider, we verify their identity and bank account details before making a first payment to them.

Timeframes

Where an invoice meets these requirements, EPSS will validate and submit the claim to the NDIS within five business days of the latest of:

- receiving the invoice
- receiving your approval, if you have chosen approve-first processing
- receiving a corrected invoice, where the original did not meet requirements
- receiving a copy of the service agreement between you and your provider, where one is needed before a claim can be made — for example, for SIL or SDA
- EPSS being endorsed for your plan, as set out in Clause 9
- completing verification of a provider EPSS has not previously paid

Once the NDIS releases funds for a claim, EPSS makes payment to your provider within 1–2 business days.

NDIS processing times sit between these two steps and are outside EPSS's control.

Reimbursements

Reimbursements follow the same process and can be processed when valid receipts and proof of payment are provided.

5. If the NDIS later requires funds to be repaid

The NDIS can review a claim after it has been paid. If the NDIS decides funds were not spent in line with your plan or NDIS requirements, it may raise a debt and require repayment.

The NDIS decides who it recovers from. This may be you, EPSS, or the provider. That decision is made under the NDIS Act and is not something this Agreement can change.

Before EPSS processes an invoice, we check it against your plan and NDIS requirements and confirm details with you where anything is unclear. That check relies on the information you give us.

As between you and EPSS:

- If the NDIS recovers an amount from EPSS because information given to EPSS was false, or because something known to be relevant was left out, **the person who gave that information agrees to repay EPSS that amount**.
- If the debt resulted from an error by EPSS in reviewing or submitting the claim, **EPSS is responsible for that amount** and will not seek it from you.
- In any other case — including where a provider's invoice was false — EPSS will not seek repayment from you.

This applies whether you are the participant managing your own plan, or a plan nominee or child representative acting for the participant.

Before asking you to repay any amount, EPSS will:

- tell you in writing what the NDIS has decided and the reasons given
- seek a review, waiver or write-off from the NDIS where there are reasonable grounds

You are responsible for ensuring supports are in line with your NDIS plan and NDIS requirements before they are used.

6. Funding and overspending

EPSS provides funding information through monthly statements and the plan management dashboard. Balances show your plan funding less claims already processed, so they may not reflect supports that have been delivered but not yet invoiced or claimed. EPSS is not aware of every support you have arranged.

You are responsible for managing your funding and making sure funds are available before supports are used. Any overspending or ineligible claims remain your responsibility.

Your funding is released in instalments called funding periods. A claim must be made against the period covering the date the support was delivered, and only where funding is available in that period.

NDIS laws also limit how long you have to claim: two years for supports delivered up to 30 November 2026, and 90 days from 1 December 2026.

Note: invoices come to EPSS from your providers, and reimbursement receipts come from you. If either arrives too late for a claim to be made, the NDIS will not pay it.

7. 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, except as set out in Clause 5
- The services provided by third-party providers

Nothing in this Agreement excludes, restricts or modifies any right or remedy you have under the Australian Consumer Law that cannot lawfully be excluded. Subject to that, liability is limited to the maximum extent permitted by law.

8. 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.
- Clause 5 continues to apply to claims submitted before the end-of-service date.
- 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.

Changes to this Agreement

EPSS may update this Agreement from time to time — for example, to reflect changes to NDIS rules or to how plan management works.

If EPSS changes this Agreement, we will tell you in writing at least 28 days before the change takes effect, and explain what has changed.

If you do not want to accept the change, you can end this Agreement before it takes effect at no cost, and EPSS will assist with a handover to your new plan manager. If you continue with EPSS after the change takes effect, the updated Agreement applies.

9. Endorsement (PACE plans)

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

If endorsement has not been completed, the details you'll need are on the Participants page at essentialplan.com.au, under **PACE plans**. You can complete endorsement by contacting the NDIS on 1800 800 110 or via the NDIS webchat, or contact EPSS if you need help.

10. Your rights and advocacy

EPSS will uphold the following rights in the way it delivers plan management services. 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

You can make a complaint or give feedback at any time, including anonymously. There are no negative consequences for doing so.

EPSS will acknowledge your complaint within 2 business days and aim to give you an outcome within 21 days. If it will take longer, we will keep you informed. When we give you an outcome, we will explain our reasons and what you can do if you are not satisfied.

Someone else can help you make a complaint, or make it for you — a family member, carer, nominee or advocate.

Contact EPSS:

Phone: 0474 329 544
Email: admin@essentialplan.com.au
Web: essentialplan.com.au

You can contact the NDIS Quality and Safeguards Commission at any time. Ask us if you need their details or help making contact.

Phone: 1800 035 544
Web: ndiscommission.gov.au

12. Your information

EPSS handles your information in line with the Privacy Act 1988, the Australian Privacy Principles and the NDIS Code of Conduct. We collect only what we need to manage your plan, store it securely, and use it only for that purpose.

With your consent, we may share information with the NDIA, your Support Coordinator or Recovery Coach, and your providers where it is needed to deliver plan management. Where a signed Consent to Share form is not practicable, we may rely on other written evidence of your authority. You can withdraw or change your consent at any time by contacting the Director. We do not share your information without your authority unless the law requires it.

We keep records relating to your plan management for at least seven (7) years after this Agreement ends, and for child participants until they turn 25.

You can ask to see the information we hold about you, including a copy of your records, and ask us to correct anything that is wrong or out of date — at no charge. Contact the Director at admin@essentialplan.com.au. Our Privacy Policy at essentialplan.com.au explains this in more detail, including where your information is held and how to raise a concern with the Office of the Australian Information Commissioner.

13. Authorisation

If anything in this Agreement is unclear, contact EPSS and we will explain it. We can also provide this Agreement in another format if that would help.

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
- If you are signing as a plan nominee or child representative, you have authority to do so and agree to be bound by these terms when acting for the participant

Signature

Signature			
Name		Date	
Relationship to Participant (if applicable) [Child Representative / Plan Nominee] *Leave blank if the participant is signing for themselves.*			