

# Service Agreement

This is a Service Agreement for Plan Management (Financial Intermediary) Services under the National Disability Insurance Scheme (NDIS).

## Who is this agreement between?

This Service Agreement is made between Aspect Plan Management and the Participant/nominated representative that is named on your NDIS Plan.

Aspect Plan Management is a registered trading name of Gobbill Australia Pty Ltd ABN 16 622 628 666 and registered National Disability Insurance Scheme Provider (4050064402).

## NDIS Participant Details (Required)

Participant Details	
First Name:	Last Name:
NDIS Number:	Date of Birth:
NDIS Plan Dates	
Start date:	End date:
Start date for Plan Management with Aspect (if different to plan dates). <i>Otherwise, date this Agreement is signed.</i>	

## Primary Contact Person (Participant or Nominated Representative - required):

This is the primary contact person for the plan that we will communicate with. If you are a nominated representative acting on behalf of a participant, put your details here, not the participants.

First Name:	Last Name:
Email address:	Phone Number:

## Option: Reimbursement Bank Account (Participant or Nominated Representative):

This is the primary bank account where any reimbursement of funds will be deposited.

Bank Name:	Account Name:
BSB Number:	Account Number:

## Term/Duration of the agreement

This Service Agreement is effective from the commencement of the participants current Plan, or the date the agreement is executed, whichever is later.

The Service Agreement will operate for the duration of time Aspect provides plan management services to you, as the Customer. This may include across multiple years, as well as after an NDIA Plan review or **Plan** renewal.

### Ending the Agreement

Should either party wish to end this Service Agreement they must give the other Party 28 days notice in writing. If either party seriously breaches this Service Agreement, the required notice period may be waived.

### Changes to the agreement

If any changes to this Service Agreement are required, Aspect will notify you in writing of the changes and these shall be considered accepted by you, unless you otherwise notify us in writing, within 7 calendar days.

### Duty of Disclosure

By completing this form, you are engaging the services of Aspect Plan Management. It will assist us if you provide a copy of your NDIS plan to Aspect Plan Management for the purposes of managing your payments and invoices for services relating to your plan.

You may choose not to provide a copy of the plan.

In the absence of receiving your NDIS plan, we require written advice from the Participant or Nominated Representative of the funded support(s) in the plan, in order to manage the payment of invoices from the plan. Providing false or misleading information about your plan may lead to the cessation of your plan management services.

The Participant or Nominated Representative must notify Aspect Plan Management of any changes to their Plan. Failure to do so may result in non-payment of invoices, and/or termination of services.

### Schedule of Supports / Our Fees

Once engaged, Aspect Plan Management will claim directly from the NDIA an agreed monthly fee for the provision of Plan Management / Financial Intermediary services.

The fees for our services will be deducted from the Participants plan according to the NDIS Price Guide / Support Catalogue. The NDIA may from time to time vary our fees.

As an indication the current fees effective as of 1<sup>st</sup> of July 2020 are:

#### Support Category Name: Improved life choices

Support Item Number	Support Item Name	Support Item Description	Price
14_033_0 127_8_3	Plan Management And Financial Capacity Building - Set Up Costs	A one-off (per plan) establishment fee for setting up of the financial management arrangements for managing of funding of supports.	\$232.35*
14_034_0 127_8_3	Plan Management - Financial Administration	A monthly fee for the ongoing maintenance of the financial management arrangements for managing of funding of supports.	\$104.45

**\*we may waive this fee if you are moving from another plan manager to us**

Optional: If you request for additional professional services such as training or further budget analysis, we may charge the following:

Support Item Number	Support Item Name	Support Item Description	Price
14_031_0 127_8_3	CB and Training in Plan and Financial Management by a Plan Manager	Hourly rate for professional services including report writing, training and/or financial analysis.	\$63.21
15_038_0 117_1_3	Training For Carers/Parents	Hourly rate for professional services including report writing, training and/or financial analysis.	\$63.21
15_037_0 117_1_3	Individual Skill Development And Training	Hourly rate for professional services including report writing, training and/or financial analysis.	\$55.47

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

#### Payment of your invoices for NDIS Services / Supports

The Participant, their Nominated Representative, or their Support Coordinator is responsible for engaging their services supports providers, in accordance with the goals and funding in the Participants plan.

It is the responsibility of the Participant, Nominated Representative or Support Coordinator to ensure that the services align with the goals of the Plan and that there is enough funding available for the services they intend to access.

After the supports are delivered, the service provider, Participant or Nominated Representative will claim payment by forwarding the related invoice to Aspect Plan Management via email.

#### Standing Approvals

To expediate payments to your Providers, Aspect Plan Management implements a Standing Approval to pay invoices from Providers on your behalf which may include cancellations, non face-to-face and travel charges. You will be provided with a monthly statement by us which You should check for correctness. You may opt out of standing approvals below if you prefer.

#### Consent for Disclosures.

We strive to be as flexible as possible and to work closely with Your Providers, especially support coordinators, Local Area Coordinators and the Agency. Aspect Plan Management will only use and disclose personal information for the primary purpose for which it was initially collected, or for purposes which are directly related to plan management functions or activities. Refer to our Privacy Policy on our website for further details.

Where there are questions regarding the use of funds, alignment to your plan goals and/or invoice payment issues, You consent to Aspect Plan Management to disclose personal details and work with third-parties to seek advice or resolve matters.

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If you opt out, we will ask you to approve invoices for services which you do not have a current service agreement in place for. If you do not respond to our request to approve an invoice to either approve or reject it, we will mark it as approved to be paid by the due date.

Please leave blank or write "Opt Out" here if you wish to opt out:	
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### Participant budgets / funded supports

The Participant or Nominated Representative will provide Aspect Plan Management with details of their support budgets as per the Participant's current NDIS plan. If the support categories or budgets change, the Participant or Nominated Representative must immediately notify Aspect Plan Management in writing.

The Participant or Nominated Representative is responsible for purchasing services/supports that fit within the funding of the Plan. Aspect Plan Management is not be responsible for any excess amounts not covered by the plan, and these will be referred back to the Participant or Nominated Representative directly for payment.

### Feedback or complaints

We are committed to providing the best plan management support and service to our NDIS Participants.

If you wish to provide feedback, or are not satisfied with the provision of support provided and wish to make a complaint, we encourage you to contact us on [contact@aspectndis.com.au](mailto:contact@aspectndis.com.au) or call us on 1300 770 986

We will provide a written response within 5 business days.

If you are not satisfied with our response to your complaint, or if you would like to seek further support or advice in relation to making a complaint, you can contact the NDIS Commission. Information about the Commission and their services can be found on their website <https://www.ndiscommission.gov.au> or contact them on 1800 035 544 (free call from landlines) or TTY 133 677. Language interpreters can also be arranged.

### Signing Confirmation of Agreement

By signing below, I acknowledge that I have read and accept this service agreement.

(Required)

Signature	
Name (printed)	
Date Signed:	

### Questions / Feedback / Complaints

For any questions, feedback or complaints Aspect Plan Management can be contacted on:

Contact Name	Aspect Plan Management
Phone	1300 770 986
Email	<a href="mailto:contact@aspectndis.com.au">contact@aspectndis.com.au</a>
Address	710 Collins St Docklands VIC 3008