



## **Service Agreement for Plan Management**

### **Parties**

This Service Agreement is between Ezy Media Group Pty Ltd, trading as **Optimum Plan Management** and the participant/nominated representative in the National Disability Insurance Scheme.

The Service Agreement will be in effective from today for the duration of the participants association with Optimum Plan Management, or until we [OPM] is notified in writing by the Participant/nominated representative to end this Service Agreement.

Upon acceptance of this Service Agreement, the Participant/nominated representative will provide a copy of their NDIS plan to Optimum Plan Management.

### **Schedule of Supports:**

Optimum Plan Management [OPM] agrees to provide to the participant the services of plan management. The supports and their prices are set out in the schedule of support below. All pricing including the cost of providing the support are GST inclusive.

Expenses for things that are not included as part of a participant's NDIS supports are the responsibility of the Participant/nominated representative.

### **Responsibilities of Plan Manager:**

Optimum Plan Management [OPM] agrees to;

- Provide plan management services
- Reconcile client balances
- Pay suppliers invoices on behalf of participants
- Process participants' reimbursement claims
- Track expenditures against participant's budget
- Provide monthly statements of expenditure and available funding
- Participants/nominated representative liaison – email, phone etc
- Consult participant/nominated representative on request, regarding decisions about how funds are spent.
- Assists in the preparation of Service agreement with service providers
- Communicate openly and honestly in a timely manner
- Treat participant/nominated representative with courtesy and respect.
- Listen to feedback from participants/nominated representative and take appropriate action.
- Protect participants' privacy and confidentiality as per Optimum Plan Management Privacy Policy.

### **Responsibilities of Participant/nominated representative:**

- Take due steps to provide information as requested to Optimum Plan Management [OPM] including approvals in a timely manner
- Treat Optimum Plan Management and its staff with courtesy and respect
- Discuss any concern about our service with Optimum Plan Management
- Advise Optimum Plan Management immediately if the participant's NDIS plan is suspended or replaced by new NDIS plan or the participant stops being a participant in the NDIS

#### **Payments:**

Optimum Plan Management [OPM] will claim directly from the NDIS an agreed monthly fee for the provision of support as agreed in schedule of supports.

By nominating Optimum Plan Management to provide plan management services and manage the funding, we will claim from NDIS portal for funding up to the amount specified in the support category and budget approved in the participant's current NDIS plan. After these supports are delivered, the service provider or participant/nominated representative will claim payment for those supports from Optimum Plan Management by forwarding an invoice to: [invoices@optimumpm.com.au](mailto:invoices@optimumpm.com.au)

## Invoice Approval

**Please note:** To continue delivering prompt payments, we have a 24 hour approval policy. Where an invoice is not formally declined within this timeframe, it will be automatically forwarded for payment. Please let us know if this will not suit your circumstances so that we can discuss any alternative options.

#### **Changes to this Service Agreement:**

If changes are required to be made to this Service Agreement, 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 both parties.

#### **Ending this Service Agreement:**

Should either party wish to end this Service Agreement they must give one month's notice in writing. If either party seriously breaches this Service Agreement the requirement of notice will be waived.

#### **Feedback, Complaints and Dispute:**

If the Participant/nominated representative wishes to provide feedback, or is not satisfied with the provision of supports and wishes to make a complaint, the Participant/nominated representative can contact head of services at Optimum Plan Management on 1300 607 404 or email [admin@optimumpm.com.au](mailto:admin@optimumpm.com.au)

In the **event** of a dispute or disagreement, both parties agree to engage in open and respectful communication to resolve the issue.

If you are not satisfied with the outcome of your complaint you can contact:

**National Disability Insurance Agency** by calling 1800 800 110 visit [www.ndis.gov.au](http://www.ndis.gov.au) or visit one of their offices in person.

#### **Incidents Management:**

Optimum Plan management takes reportable incidents seriously, hence it has a robust procedures in place, including incident registrar and reporting forms to follow should there be any reportable incidents. A copy of this procedure document is given to the participant with this service agreement

#### **Goods and services tax [GST]**

For the purpose of GST legislation, the parties confirm that:

- A supply of support 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, in the Participants NDIS plan currently in effect under section 37 of the NDIS Act:
- Optimum Plan Management will pay GST as per specified in the National Disability Insurance Scheme Act 2013.

#### **Contact and Banking Details:**

The Participant/nominee representative will provide bank details, if necessary, to Optimum Plan Management for reimbursement.

#### **Schedule of Supports – Improved Life Choice:**

Support	Description	National	Remote	Very Remote
Financial Intermediary One-off Set-up cost [14_033_0127_8_3]	One-off - Setting up client details into client management system. Setting up client account within finance system. Setting up service and budget allocation.	\$232.35 Set-up fee	\$325.29 Set-up fee	\$348.54 Set-up fee
Financial Intermediary monthly processing [14_033_0127_8_3]	Reconciling client balances Paying supplier invoices on behalf of the client. Processing client reimbursement claims. Tracking expenditure against budget Monthly statement of expenditure and available funding. Assisting with purchasing Client Liaison – emails, phones calls etc	\$104.45 per month	\$146.23 per month	\$156.67 per month
Non Plan Management Activities	Such as undertaking regular liaison with providers and monitoring support provision [where	\$100/hr	\$100/hr	\$100/hr

*Please note any changes will be in accordance with the NDIA Pricing Arrangement.*

#### **Contacted Details:**

**Optimum Plan Management**

Nationwide

Head office: 21A Westall Rd, Clayton VIC Australia

Postal: P O Box 197, Dingley Village, Vic. 3172

Phone#: 1300 607 404.

Email: [admin@optimumpm.com.au](mailto:admin@optimumpm.com.au)

Invoices: [invoices@optimumpm.com.au](mailto:invoices@optimumpm.com.au)

Website: [www.optimumpm.com.au](http://www.optimumpm.com.au)