

Service Agreement for Financial Plan Management Services

1 THE PARTIES

This agreement is between Parent to Parent Association QLD Inc (P2P) and;

_____ ('You')

of _____ (your address) Represented by:
(parent/guardian/advocate)

NDIS Number _____

2 AGREEMENT TO PROVIDE SUPPORTS

This Agreement is in accordance with the rules and the goals of the National Disability Insurance Scheme (NDIS). P2P agrees to provide Financial Intermediary (Plan Management) Services to you.

This Service Agreement works in conjunction with your current NDIS plan and all future NDIS plans until you no longer wish for P2P to continue to provide Plan Management services for you.

3 USING P2P FOR OTHER SERVICES

The P2P Financial Plan Management team is independent of any other service that P2P may provide, such as Support Coordination. You can use your choice of provider for all of your services, and do not need to engage P2P for both services. You can cancel one service at any time without impacting the other.

4 CHANGING AND ENDING THIS SERVICE AGREEMENT

If changes to the Service Agreement are required, P2P and you agree to discuss and review this Service Agreement. Additions or requests for change of services do not require a change to the Service Agreement, but can be requested in a form of your choice. This request will be kept on file.

The Service Agreement remains current unless:

- the services provided to you by P2P are no longer funded in your current or future NDIS Plan/s provided to us by you, and no agreement for Fee for Service is entered into, or
- you or P2P cancel the Agreement P2P and you agree you are able to end this Service Agreement if services are no longer needed.

P2P require a 14 day notification to end service to assist with ensuring outstanding invoices are paid, and smooth handover to another provider or yourself. You will need to make sure all providers are aware of the change in plan manager and have all invoices for service dates prior to cancelling submitted to us for claiming before we can cancel service bookings.

We commit to assisting with exiting as soon as possible and may not require full 14 days.

5 PRICING AND PAYMENTS FOR OUR SERVICES

Pricing is in line with the P2P Price Guide for Plan Set Up fees and Monthly Financial Intermediary services, which is processing invoices with the NDIS portal, and on successful claim of funds, paying your providers, or providing you with reimbursements.

P2P only charge what is available through your NDIS Plan. Currently this is:

New Plan Set Up Fee (if available)	One off at \$227.53 no GST applicable
Monthly Invoice Processing Fees	Monthly at \$102.28 no GST applicable
Cancellation Fees	\$0

P2P reserves the right to change pricing in line with NDIS Price Guide updates. Any other changes to pricing will be discussed with you prior to change. Plan Management services are NDIA managed and fees are claimed directly from the National Disability Agency.

6 CLAIMING FROM NDIS AND PAYING INVOICES

Our invoice processing time is up to 10 working days from approval of invoices. We always aim for faster. We first must make a successful claim from the NDIS on your behalf and then pay your providers or yourself for reimbursements.

P2P do not monitor or control your spending. That is your choice and you are in control your spending within budget and the NDIS reasonable and necessary guidelines.

P2P cannot provide business advice to your providers, but we have put information together to assist them with invoicing and claiming. Invoices that are not in the format approved by the Australian Tax Office which include an ABN or other recognised business number are unable to be paid, or must have 40% retained for the ATO. This information can be found on our website.

7 APPROVING INVOICES FOR CLAIMING AND PAYMENT

You have two choices of how we process your invoices:

1. We can claim and pay on receipt of invoices directly from your provider.

For this option, we don't check whether the invoices match services, and we only recommend this if you have a long relationship and regular supports with your provider. If you choose this option, we would like an expected expenditure so we can alert you if there are major differences.

2. We can claim and pay after you have approved invoices.

This is our recommended option so you have most control of your invoices, and until the NDIS has been around for a while, ensure your spending is in line with your budget.

Providers should email invoices to you directly, and you forward the invoices to us for payment, which we will take as your approval. This is the quickest way to get your providers paid.

Alternatively, we will email you invoices for your approval. This can cause delays. To assist both yourself and provider, after 48 hours, we will assume you do not dispute the invoice, and will pay on your behalf.

8 FEEDBACK, COMPLAINTS AND DISPUTES

P2P welcomes your feedback on our services, as it improves our quality, and makes sure we are working in line with our values. We also see complaints as an important part of our continuous improvement.

Our management are here to listen to you confidentially. Feedback and complaints can be made either in person, verbally, or in writing to: manager@p2pqld.org.au. P2P will follow up the complaint and respond within three (3) business days of receiving the complaint.

If you are not satisfied with P2P's response, you can contact the **National Disability Insurance Agency** by calling **1800 800 110**, visiting their offices in person, or visiting www.ndis.gov.au for further information. The P2P complaints and dispute resolution policy is available on our website.

9 P2P RESPONSIBILITIES

We will:

- treat you with courtesy and respect, and communicate openly and honestly and a format of your choosing and consult you on decisions about your plan and how we best support you
- listen to your feedback and resolve problems quickly, including our charges
- give you information on how complaints or grievances are managed
- protect your privacy and confidentiality and right to choice and control
- keep clear records on services provided, that you are able to request at any time
- provide supports in a manner consistent with all relevant laws, including the National Disability Insurance Scheme Act 2013 (Cth) and rules, and the Australian Consumer Law.

10 YOUR RESPONSIBILITIES

You will:

- let P2P know immediately if there are any changes to the NDIS Plan that affects the services provided under this agreement, including any reviews, changes in the financial management option, or if you cease to be a Participant
- let P2P know immediately if you nominate someone else to assist you in managing your NDIS Plan
- let P2P know if you change your address or contact details
- treat P2P personnel with courtesy and respect
- talk to P2P if you have any concerns about the services or supports being provided
- ensure your invoices are for supports up to pricing limits set out in the NDIS price guide and reasonable and necessary guidelines
- approve your invoices for payments as per your NDIS plan budgets
- Coordinate with your providers to ensure invoices are sent through regularly and they comply with Australian Tax Office requirements

11 ACKNOWLEDGEMENT

I agree to the terms and conditions of this service agreement

Approval terms (choose one):

I would like P2P to pay invoices on receipt from my providers and will send an expected expenditure.

OR

P2P can process invoices after 48 hours of sending me an approval request unless I state to hold a payment until further notice.

12 AGREEMENT SIGNATURES

All parties agree to the terms and conditions of this Service Agreement.

You

Signature: _____

Name: _____

Date: _____

OR YOUR NOMINEE/LEGAL GUARDIAN

Signature: _____

Name: _____

Date: _____

P2P AUTHORISED PERSON

Signature: _____

Name: _____

Position: _____

Date: _____

(OPTIONAL) PRIVACY AND CONSENT TO SHARE INFORMATION

P2P respects your privacy and personal information and will not disclose to any party, unless there is a duty of care to prevent harm occurring. Our full Privacy Policy is available on www.p2pqld.org.au.

P2P are required to report to the NDIA or disclose information relating to plan expenditure on request.

We also give you the option for our team to work closely with others to resolve issues that come up from time to time with the NDIS. We need your consent to do this.

We will not reveal your budget to others without your approval, but may discuss the best ways to invoice, or charge for a service you have approved, for example.

P2P can contact my other Service Providers to sort out invoicing and payment issues, and have consent to share information.

P2P can contact my Local Area Coordinator or NDIS Planner to resolve issues with my plan, and have consent to share information.

You

Signature: _____

Name: _____

Date: _____

OR YOUR NOMINEE/LEGAL GUARDIAN

Signature: _____

Name: _____

Date: _____