



## TERMS AND CONDITIONS

The Customer is a NDIS participant and has asked Connect Plan Management (the Provider, we, our and us) to provide plan management services. This Service Agreement documents the terms and conditions for the provision of those services.

### 1. Parties to Service Agreement

This Service Agreement is between us and the Customer (the Customer, you, your).

This Service Agreement will commence on the Start Date for the duration of the Customer's association with Connect Plan Management or until we are notified otherwise in writing by you or your Representative.

### 2. Schedule of Supports:

We agree to provide you with the services set out in the Key Details section. These services may include:

- Plan Management and Financial Administration Set Up
- Financial and Service Intermediary Set Up
- Plan Management Financial Administration services
- Plan and Financial Capacity Building

The supports and their prices are set out in Schedule of Supports. All prices are GST inclusive (if applicable). The price charged for services will increase annually in line with changes made to the NDIS Price Guide applicable for the State where you reside or as set out in your NDIS plan.

### 3. Responsibilities of Provider

Our responsibilities under this Agreement are to:

- Provide financial administration services for your NDIS plan
- Pay supplier invoices on your behalf
- Provide monthly statements showing plan expenditure and remaining funds against budget
- Assist with ad-hoc requests where possible and appropriate
- Process reimbursement claims and assist with purchases (where appropriate)

- Inform you of any significant variances in plan spending (where identified)
- Assist you in your dealings with providers (where appropriate)
- Act in good faith
- Communicate with you via phone and email
- Communicate honestly with you in a timely way
- Treat you with courtesy and respect
- Resolve issues quickly by listening to your feedback
- Protect your privacy and confidential information in accordance with our Privacy Policy

Your Responsibilities under this Agreement are to:

- Provide us with supplier invoices (where you receive them directly) on a timely basis
- Provide your suppliers with information about how to send us invoices
- Advise us if you engage a new service provider and / or decide to finish services with a provider
- Provide us with any information we reasonably request in a timely way
- Treat us and our team members with courtesy and respect
- Discuss any concerns about our service with us
- Advise us if your NDIS plan ends or is replaced by a new NDIS plan

### 4. Payments

#### Our Fees

We will claim directly from the National Disability Insurance Agency (NDIA) fees for the provision of financial administration support as agreed in Schedule of Supports starting from the Start Date of this Agreement.

#### Payments to Your Providers

Following delivery of services to you, the service provider (or you) will claim payment for those supports from us by forwarding an invoice to [invoices@connectplan.com.au](mailto:invoices@connectplan.com.au) or sending the invoice to our postal address. We will claim from the NDIA portal for funding up to the amounts specified in the support category and budget approved in your NDIS plan.



## 5. NDIS Plan

You agree to provide us with a copy of your NDIS plan support categories and budgets at the Start Date. Should your NDIS plan change, you agree to advise as soon as possible. This is important to ensure the services you receive from your providers continue without interruption.

You authorise us to ask the National Disability Insurance Agency to share your plan with us electronically via the NDIS Portal (if required). This is required in order for us to perform our role as your plan manager.

## 6. Ending this Service Agreement

Either party may end this Service Agreement by giving the other one month's notice in writing. Notice may be waived by the other party at its sole discretion. If either party seriously breaches this Service Agreement the requirement of notice will be waived.

## CONTACT US

**E** [hello@connectplan.com.au](mailto:hello@connectplan.com.au)

**P** 1300 11 22 89

**A** 50 Southgate Ave, Cannon Hill QLD 4170  
**Servicing all of South East Queensland**

## 7. Feedback, Complaints and Disputes

If you not satisfied with an aspect of our services or wish to make a complaint, please contact us by telephone on 1300 11 22 89 or via email at [hello@connectplan.com.au](mailto:hello@connectplan.com.au). We will endeavour to respond to your message as soon as possible. Typically we will respond within one business day.

If we are unable to resolve your complaint or you are dissatisfied with our response to your complaint you may contact the NDIS Commission ([www.ndiscommission.gov.au](http://www.ndiscommission.gov.au) or 1800 03 55 44).

## 8. Goods and Services Tax (GST)

For the purposes of GST legislation, the parties confirm that a supply of supports 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 (NDIS Act), in the participant's NDIS plan currently in effect under section 37 of the NDIS Act.