



Dedicated Plan Management

Service Agreement

1. PARTIES TO THE AGREEMENT

This Service Agreement is made between:

Participant

Full Name: Details as per sign up form

NDIS No: Details as per sign up form

AND

Plan Manager

Dedicated Plan Management

ABN: 49 680 406 482

138 Juliette St, Greenslopes, QLD, 4120

Phone: 0489224800

Email: admin@mydpm.com.au

This Service Agreement will commence on the date the sign up form was submitted. and will continue until either the Participant (or their Representative) or Dedicated Plan Management ends it in line with the "Ending this Agreement" section.

If the Participant has a Representative (e.g. nominee, guardian or parent), that person enters this Agreement on behalf of the Participant.

2. PURPOSE OF THIS AGREEMENT

The purpose of this Agreement is to set out how Dedicated Plan Management will provide NDIS Plan Management services to the Participant under their NDIS Plan.

This Agreement is made in the context of the National Disability Insurance Scheme (NDIS), which is designed to: Support the independence, social and economic participation of people with disability; and Enable people with disability to exercise choice and control in the pursuit of their goals, and in the planning and delivery of supports.

This Agreement does not cover direct support services (such as support work, therapy, personal care, transport, etc.). It only covers Plan Management services.

3. DEFINITIONS

In this Agreement:





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Dedicated Plan Management, we, us, our

Means Dedicated Plan Management Pty Ltd; ABN 49 680 406 482.

Participant, you, your

Means the NDIS participant named in this Agreement.

Representative

Means a person legally or formally authorised to act on behalf of the Participant (such as a plan nominee, guardian, parent or other authorised person).

NDIS

Means the National Disability Insurance Scheme established under the National Disability Insurance Scheme Act 2013 (NDIS Act).

NDIA

Means the National Disability Insurance Agency, which administers the NDIS.

Plan Management Services

Means the financial intermediary services we provide under your NDIS plan, including paying approved NDIS invoices, keeping records, and helping you track your budget.

Providers / Other Service Providers

Means any person or organisation that delivers supports to you and issues invoices to be paid using your NDIS funds (for example, support workers, therapists, support coordinators, etc.).

4. SCOPE OF SERVICES (WHAT WE WILL DO)

Dedicated Plan Management agrees to provide the following Plan Management Services in line with your current NDIS Plan and the NDIS rules:

1. Set up and maintain your plan in our system, including:
 - Recording your NDIS budgets by support category and registration group.
 - Storing your key contact and representative details.
2. Receive and process invoices from your chosen providers, including:
 - Checking invoices to ensure they include required NDIS information (e.g. participant name, dates, support item number, hourly rate, total amount, etc.).
 - Checking invoices for basic consistency with your NDIS Plan, budget, and NDIS Pricing Arrangements and Price Limits.
 - Querying invoices with you and/or your providers if there are any concerns or missing/incorrect information.
3. Claim from the NDIS and pay your providers, including:





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- Submitting claims to the NDIA for payment of approved supports on your behalf.
- Paying your providers from your NDIS plan after a successful claim.
- Processing reimbursements to you (if applicable) where you have paid for approved supports in line with NDIS rules and have provided appropriate evidence.
- 4. Monitor and track your NDIS budgets, including:
 - Maintaining accurate records of all claims and payments.
 - Providing regular budget information (e.g. monthly statements or on request) about how much has been spent and how much remains.
 - Letting you know if you are at risk of over or under-spending your plan.
- 5. Communicate and collaborate with you and your network, including:
 - Communicating clearly, openly and respectfully with you and/or your Representative.
 - Contacting you when we need clarification or approval of invoices.
 - Communicating with your providers, the NDIA and Local Area Coordinators (LACs) or support coordinators, where appropriate and related to your NDIS budgets and payments.
- 6. Comply with NDIS and other laws, including:
 - Providing services in line with the NDIS Act, NDIS Rules and relevant NDIS policies.
 - Following the NDIS Code of Conduct.
 - Protecting your privacy and handling your information in line with privacy laws.

We do not:

- Decide what supports are “reasonable and necessary” (this is the role of the NDIA).
- Provide direct supports (e.g. support work, therapy, transport, etc.).
- Authorise or change your NDIS plan or funding (only the NDIA can do this).
- Give financial, legal, or tax advice outside the scope of plan management.

5. CONSENT

Your informed consent is required for the Services provided by Dedicated Plan Management. You may withdraw your consent for any specific Service at any time, and the specific Service will cease immediately.

Consent will be sought prior to disclosing any information to external parties.

6. PARTICIPANT / REPRESENTATIVE RESPONSIBILITIES

You and/or your Representative agree to:

1. Use your choice and control
 - Choose your own providers and supports.





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- Make sure you are comfortable with the supports you purchase and the amounts you agree to pay providers.
 - 2. Provide information we need
 - Let us know which providers you are using and, where possible, provide copies of any service agreements.
 - Ensure your contact details and those of your Representative are correct and kept up to date.
 - Provide any information we reasonably need to process payments or answer invoice queries.
 - 3. Approving invoices
 - Tell us clearly how you want invoices approved (e.g. automatic approval, or approval for each invoice).
 - Respond promptly when we contact you about invoices we are unsure about, or when we ask whether you approve an invoice.
 - Let us know immediately if you do not want a particular invoice to be paid.
 - 4. Compliance with NDIS rules
 - Only purchase supports which are funded in your plan and in line with NDIS rules and policies.
 - Let us know if your plan changes, is replaced, is suspended, or if you stop being a NDIS participant.
 - 5. Respect and safety
 - Treat Dedicated Plan Management staff with courtesy and respect.
 - Not engage in behaviour that is abusive, violent, threatening, or unsafe for our staff.
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7. FEES AND CHARGES

Dedicated Plan Management will charge the NDIA for Plan Management Services using the relevant support item in the current NDIS Pricing Arrangements and Price Limits (previously known as the NDIS Price Guide).

The cost of Plan Management is claimed from the NDIS and is not charged to you personally; Plan Management funding is included in your plan (under Capacity Building – Improved Life Choices or its current equivalent).

We will update our claims in line with any changes to the NDIS Pricing Arrangements and Price Limits. Any change in price limits will automatically apply from the date set by the NDIA.

8. PAYMENTS

1. NDIA-managed Plan Management funding
 - For Plan Management services, Dedicated Plan Management will claim directly from the NDIA using your Plan Management budget in line with the approved NDIS support items.
 - You are not required to pay us directly for Plan Management services as they are funded in your NDIS plan.





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2. Paying your other providers

- After we receive an invoice from your provider and
 - it relates to supports funded in your plan,
 - it is consistent with NDIS price limits and rules, and
 - you have approved it (as per your chosen approval method), we will claim from the NDIA and, if the claim is successful, pay the provider from your NDIS funds.

- If a claim is unsuccessful or appears non-compliant, we may:
 - contact you and/or the provider for clarification.
 - decline to pay the invoice if it does not meet NDIS requirements or your instructions; and
 - explain to you why we are unable to process it.

3. Reimbursements to the Participant

- If you have paid for support yourself and wish to claim from your NDIS funds, you must provide:
 - a valid tax invoice/receipt, and
 - any other evidence required by the NDIS.
 - We will submit a claim to the NDIA and, if successful, reimburse you from your plan.
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9. PRIVACY, CONFIDENTIALITY AND CONSENT

Dedicated Plan Management will:

Treat your personal information as private and confidential;

Only collect, use and disclose your information in line with privacy laws and NDIS requirements;

Obtain your consent before sharing information with others, unless we are required or authorised by law to do so (e.g. serious incident, risk of harm, court order).

You consent to Dedicated Plan Management:

Communicating with the NDIA, your LAC, Support Coordinator and your providers as necessary to manage and pay for supports from your plan;

Undertaking audits and reviews as required by NDIS or other regulatory bodies.

You may withdraw your consent at any time, but this may affect our ability to provide plan management services.

10. CHANGES TO THIS AGREEMENT OR SERVICES

This Agreement can be reviewed at any time by mutual agreement.

We will review the provision of support at least annually, or sooner if your NDIS plan changes or if you request a review.

Any changes to this Agreement will be recorded in writing (for example, by email or updated document) and agreed to by both parties.





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11. ENDING THIS AGREEMENT

Either party may end this Agreement by providing 7 days' notice (in writing, by email, or by phone if you are unable to provide written notice).

Dedicated Plan Management may end this Agreement immediately if:

- You are no longer an NDIS participant or your funding is exhausted;
 - We reasonably believe we can no longer safely or appropriately provide services to you (for example, due to repeated abusive or unsafe behaviour);
 - You or your Representative repeatedly fail to respond to necessary communications about your plan or invoices;
 - You repeatedly request that we process invoices that are clearly inconsistent with NDIS rules or your NDIS plan;
 - There is a serious breach of this Agreement by you or your Representative.
- If this Agreement ends, Dedicated Plan Management will:
- Stop processing new invoices from the agreed end date;
 - Provide you with a statement of your plan budget and transactions processed up to the end date (within 7 days of the last processing date);
 - Inform the NDIA and, where appropriate, your providers that we are no longer your Plan Manager.
 - You are free to choose another Plan Manager at any time. We will cooperate reasonably with any transition.
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12. COMPLAINTS, FEEDBACK AND YOUR RIGHTS

You have the right to safe, quality services and to be treated with dignity and respect. You have the right to:

- Provide feedback or make a complaint without fear of it affecting your services;
- Have your complaint taken seriously and handled promptly;
- Have an advocate or support person help you with a complaint.

Complaints or feedback to Dedicated Plan Management

You can give feedback or make a complaint:

- In person to the Director or a staff member;
- By phone: 0489 224 800;
- By email: admin@mydpm.com.au;
- By post:
Dedicated Plan Management
138 Juliette St
Greenslopes QLD 4120





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We will handle your complaint in line with our Feedback and Complaints Policy and will aim to resolve issues as quickly as possible.

Complaints to the NDIS Commission

If you are not satisfied with our response, or prefer to speak to someone else, you can contact the NDIS Quality and Safeguards Commission:

Phone: 1800 035 544 (TTY 133 677)

National Relay Service: ask for 1800 035 544

Online: complaint form via the NDIS Commission website.

13. AGREEMENT SIGNATURES

By signing below, the parties agree to the terms and conditions of this Service Agreement.

Signed for and on behalf of

DEDICATED PLAN MANAGEMENT PTY LTD

ABN 49 680 406 482 (Dedicated Plan Management),

Participant accepts this service agreement by ticking the box on the sign up form.

"I have read and agree to the terms and conditions of this service agreement."

