



AVER

PLAN MANAGERS

SERVICE AGREEMENT & CONSENT TO SHARE

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SERVICE PROVISIONS

For provision of Financial Intermediary & Plan Management services Aver Plan Managers is a plan management and financial intermediary service to participants of the NDIS.

This Service Agreement is between Aver Plan Managers and the participant/nominated representative in the National Disability Insurance Scheme. This Service Agreement will be in effect from today for the duration of the Participant's association with Aver Plan Managers, or until we are notified otherwise in writing by the Participant/nominated representative.

AVERS RESPONSIBILITIES

- Provide financial intermediary services
- Reconcile client balances
- Pay supplier invoices on behalf of client
- Process client reimbursement claims
- Track expenditure against client budget
- Provide monthly statements of expenditure and available funding upon request
- Assist with purchases where appropriate
- Troubleshooting
- Client liaison – emails, phone calls etc.
- Communicate openly and honestly in a timely manner
- Treat the Participant/nominated representative with courtesy and respect
- Listen to the Participant/nominated representative's feedback and resolve problems quickly
- Protect the Participant's privacy and confidential information as per Aver Plan Managers Privacy Policy available on the Aver Plan Managers website.

RESPONSIBILITIES OF PARTICIPANTS / NOMINATED REPRESENTATIVES

I agree to:

- Take due steps to provide information as requested by Aver Plan Managers in a timely manner
- Treat Aver Plan Managers staff with courtesy and respect
- Discuss any concerns about our service with Aver Plan Managers
- Advise Aver Plan Managers immediately if the Participant's NDIS plan is suspended or replaced by a new NDIS plan, or the Participant stops being a participant in the NDIS.

SCHEDULE OF SUPPORTS

Aver Plan Managers will claim directly from the NDIA a set up fee (if applicable) and a monthly fee for the provision of support as agreed in Schedule of Supports. Aver's current fee structure uses the following line items:

Plan Management & Capacity Building Set-up costs (14_033_0127_8_3)

- Initial consultation
- Loading of client details into client management system
- Setting up client account within finance system
- Loading plan
- Setting service bookings
- Budget allocation

Plan Management Financial Administration (14_034_0127_8_3)

- Reconciling client balances
- Paying supplier invoices on behalf of client
- Processing client re-imburement claims
- Tracking expenditure against client budget
- Monthly statements of expenditure and available funding
- Assisting with purchases
- Troubleshooting
- Client liaison – emails, phone calls etc

PLAN MANAGEMENT PROCESS

By nominating Aver to be your Plan Manager, you will be allowing us access to the NDIS funding that has been made available to you through your NDIS plan. This funding will be accessed by Aver, through the NDIS online portal (PRODA).

From there, Aver will be able to use the information in your online portal to set up your plan management services, and begin processing your payments.

Aver will do so by administering, categorising and uploading your invoices and/or reimbursements through our online NDIS Portal.

Once we have submitted all actioned emails through the Service providers and/or Participant/nominated representative will claim payment for those supports from Aver Plan Managers – by forwarding an invoice to accounts@averplanmanagers.com.au .

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.

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 Mahrienne Haughey on 1300283776. 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; Aver Plan Managers will pay GST as per specified in National Disability Insurance Scheme Act 2013 (NDIS Act)

PARTICIPANT CONSENT

Aver Plan Managers collects your information for the primary purpose of providing quality supports and services to you, including some personal information to ensure our services meet your individual needs. This information will also be used for:

- administrative purposes for providing our service planning your supports and services.
- disclosure of information to the NDIA, the NDIS Quality and Safeguards Commission or other government agencies when needed.
- disclosure of information pertaining to the funded supports in your plan to other disability support providers in order for them to be able to provide appropriate services

We have a privacy and confidentiality policy that is available on our website. This policy provided guidelines on the collection, use, disclosure, and security of your information.

All Aver Plan Managers staff are aware of the sensitive nature of the information that you disclose. They are trained and all possess appropriate clearances, and will work within the relevant privacy legislation and Aver's policy and processes

You have the right to gain access to the information we hold about you. You can find information on how to request access or update your personal information in our privacy policy. Aver Plan Managers may disclose your information to other service providers or health professionals only with your consent.

By filling in your details below, you agree to the provision of financial intermediary services and plan management by Aver Plan Managers. You also give consent for Aver Plan Managers to share information regarding your plan to appropriate & relevant parties.



PERSONAL INFORMATION

1. Participants Name	
2. Date of Birth	- - / - - / - - - -
3. NDIS Participant Number	4 3 - - - - - - - - - -

4. Participants Residential Address	_____		
	Street Address		
	_____	_____	_____
	Suburb	Post Code	State
5. Is this address a SIL (supported Independent living accommodation)	YES / NO		

PREFERRED CONTACT DETAILS

6. Is the client the preferred contact If you have selected yes, please skip to question 7	YES / NO
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7. Nominated Preferred contact's Name & relation to participant	_____	_____
	Contact's Name	Relationship to the Participant
8. Preferred contact's details	_____	_____
	contact number	contact email



ADDITIONAL PARTICIPANT INFORMATION

9. Bank Details You can choose to provide us with your bank details so we can reimburse you for any services you have paid out-of-pocket	_____	_____
	BSB	Account Number

	Account Name	
10. Details you would like AVER to know about you Please use this section to include any specific information you would like AVER to have. This may be arrangements you have with your family, friend & service providers or a preferred method of contact etc.		
11. Current Plan Details	_____	_____
	Plan Start Date	Plan End Date

	Plan Review Date	
12. Is this your first NDIS plan?	YES / NO	

TERMS & CONDITIONS OF SERVICE

- Any advice given by Aver Plan Managers outside of financial intermediary advice shall be considered general in nature.
- Aver Plan Managers shall not be liable for any, failure of, or delay in, the performance of this service agreement, for the period that such failure or delay is;
 - *Beyond the reasonable control of a party*
 - *Materially affects the performance of any of its obligations under this agreement, and could not reasonably have been foreseen or provided against (e.g. Government Acts prohibiting or impeding any party from performing its respective obligations under the Service Agreement contract) or (e.g. prolonged lack of power supply).*
- Nothing in the Aver Plan Managers service agreement negates or diminishes the statutory guarantees regarding the supply of services the Participant/nominated representative receives under Australian Consumer Law (*Competition and Consumer Act 2010- Schedule2*)
- Aver Plan Managers takes in good faith the information provided by the Participant/nominated representative to be true and accurate, and that any claims presented to Aver Plan Managers are a true reflection of goods and services provided to the Participant in line with the NDIS guidelines (*National Disability Insurance Scheme Act 2013*)
- Aver do not require clients to fill in a new service agreement for each new NDIS plan they receive. Once signed, this service agreement is enduring, and as such, will remain current until a formal notice to cease services has been provided to Aver , which you, as the participant (or participants representative), have the right to do so at any given time.

Aver will ensure an annual 'continuance of service' notice is presented to the client to inform them of the anniversary of the service agreement.

By providing your signature below, you, as the participant (or participant representative), are agreeing to the information that has been presented to you in this document.

Participant / Representatives
Name

Participant / Representatives
Signature

_____/_____/_____
Today's Date