

# NDIS PLAN MANAGEMENT SERVICE AGREEMENT



## Thank you for choosing Trio Plan Management to support you in your NDIS journey.

This document is a written agreement between you and Trio Plan Management. It outlines the way we work and the supports we can provide to you.

When you have read this Service Agreement and accept the terms and conditions, please complete the Trio Plan Management Registration Form available on our website (<https://trioplanmanagement.com.au>).

Your completion of the Trio Plan Management Registration Form is taken as your acceptance of this Service Agreement.

Please contact us on (08) 6234 8333 during standard business hours or via [admin@trioplanmanagement.com.au](mailto:admin@trioplanmanagement.com.au) if you have any questions or concerns.

We look forward to working with you to help you to reach your goals and aspirations.

### Together we both have rights and responsibilities:

- △ Be courteous and respectful to each other.
- △ Communicate regularly and promptly, especially as your supports and NDIS plans evolve and renew.
- △ Work together and make decisions together.
- △ Listen to feedback and work together to resolve any problems as quickly as possible.
- △ Keep all information private and confidential unless there are safety concerns.
- △ Follow all the terms and conditions outlined in this Service Agreement.

### Our Responsibilities

Trio Plan Management is responsible for providing plan management supports that meet your needs while complying with relevant laws, rules and standards. This compliance includes, but is not necessarily limited to, the National Disability Scheme Act 2013, Disability Services Act 1993, National Standards for Disability Services and Australian Consumer Law.

This Service Agreement is made within the context of the National Disability Insurance Scheme (NDIS).

As a registered NDIS provider, Trio Plan Management has an obligation to report certain events including reportable incidents to the National Disability Quality and Safeguarding Commission (NDIS Q&S Commission).

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Our Privacy Policy, and our standard Service Agreement Terms and Conditions are provided on the Trio Plan Management website ([trioplanmanagement.com.au](http://trioplanmanagement.com.au)).

To ensure our service to you is maintained to a high standard, all Trio Plan Management employees are suitably qualified and undergo regular training.

## What is Plan Management

There are two types of services that Trio Plan Management can provide, including:

- △ the financial administration of your NDIS plan, and
- △ plan and financial management capacity building supports.

## Plan Management (Financial Administration)

Plan management refers to the financial administration of your NDIS plan on your behalf. This service assists you by:

- △ managing and monitoring your NDIS budget in accordance with this Service Agreement for the duration of your NDIS plan.
- △ managing your NDIS claims and disbursing funds to your support providers for delivered services.
- △ maintaining records and producing monthly statements for you, showing the financial status of your plan, and
- △ facilitating access as required to a wider range of service providers, including non-registered providers, while ensuring compliance with the price limits contained within the NDIS Price Guide.

When you elect to have your NDIS Plan managed by Trio Plan Management funding is included in your plan, but is separate to the reasonable and necessary funding of your NDIS disability supports. That is, it does not reduce the funds you have available for your other supports.

Plan management funding is drawn from your plan as a monthly processing fee. The monthly processing fee covers the ongoing costs Trio Plan Management incurs for the financial administration, payment of invoices, and monitoring of your NDIS Plan budget. This includes, but is not limited to, staff wages, software licensing, equipment and amenities costs.

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## Capacity Building and Training

Subject to your individual circumstances, 'capacity building and training in plan and financial management' may be included in your NDIS plan as a reasonable and necessary funded support. Funding for this support is separate to funding included in your NDIS plan for plan management services and is claimed at an hourly rate.

This capacity building and training support focuses on strengthening your ability to undertake tasks associated with the self-management of your own supports. This includes, but is not limited to:

- △ building your financial and administration skills to set and monitor budgets, pay providers in line with service agreements, and gain financial organisational skills.
- △ enhancing your ability to direct your own supports including deciding who provides these supports and how they are delivered, and where possible and appropriate, developing your skills to self-manage your own NDIS plan.

## Non-Face-to-Face and Direct Supports

Most of the services provided to you under Plan Management are Non-Face-to-Face Supports. These include:

- △ Processing support provider invoices for payment (or your approval for payment) within 2 working days of receipt.
- △ Reviewing your NDIS budget.
- △ Providing regular Statements and information to keep you informed of the status of your NDIS budget.
- △ Providing advice and assistance over the phone or via email for any questions or requests you may have.

If you have "Capacity Building and Training in Self-Management and Plan Management" included in your NDIS plan as a reasonable and necessary funded support, Trio Plan Management may provide both Non-Face-to-Face and Direct supports to you.

Direct Supports include face-to-face appointments, activities and time spent directly with you. For example, we may arrange a regular meeting with you to assist you with managing your household budget to help build your financial management skills.

Non-Face-to-Face supports for "Capacity Building and Training in Self-Management and Plan Management" may include:

- △ Designing and delivering a financial management skills training package to meet your specific needs.
- △ Developing individual or specialised resources for you. For example, visual aids or spreadsheets.
- △ Working with others, with your consent, to help you achieve your goals, including teachers or support workers.
- △ Writing reports requested by NDIA including assessments and recommendations for ongoing support needs.

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## Travel Charges

Where we provide Direct supports or appointments, these may be delivered at our office locations, in your home, your workplace or other suitable location that works for you. When we are required to travel from our office to another location to provide Direct supports, travel time and the cost of the kilometres travelled will be claimed from your NDIS Plan.

We do our best to minimise travel costs when scheduling supports and appointments.

- △ When a Trio Plan Management staff member is travelling to your home or another place in the community (as agreed by you), we will claim a maximum of 30 minutes of driving time per appointment.
- △ If you live in a regional or rural area, we will claim a maximum of 60 minutes of driving time per appointment.
- △ Travel time is claimed at the hourly rate of the support being provided and will be listed as "Provider Travel".
- △ If our staff member is travelling to provide support to more than 1 person in the same area, the travel claims will be shared so we can minimise the cost to each person.
- △ If our staff member has already started driving to meet you when you cancel, travel time and kilometres will be claimed from your NDIS Plan.

## Pricing

As noted previously under the Plan Management (Financial Administration) Section, the costs for Plan Management are not deducted from the funds available for your other supports. However, for transparency, the non-remote costs associated with Plan Management as per the current NDIS Pricing Arrangements and Price Limits Guide are:

Item Number	Item Name & Notes	Unit	National
14_034_0127_8_3	Plan Management - Monthly Fee A monthly fee for the ongoing maintenance of the financial management arrangements.	Monthly	\$104.45

For Remote and Very Remote costs please contact us.

When Trio Plan Management provide you agreed supports for capacity building and training in plan and financial management, the costs for these services delivered non-face-to-face or to non-remote areas are:

Item Number	Item Name & Notes	Unit	NDIS Price Limit	Trio Rate
01_034_0117_8_1	Capacity Building and Training in Self-Management and Plan Management	Hour	\$70.23	\$65.00
01_034_0117_8_1	Provider Travel (30 minute maximum per trip) Capacity Building and Training in Self-Management and Plan Management	Hour	\$70.23	\$65.00
01_034_0117_8_1	Provider Travel (Kilometres travelled) Capacity Building and Training in Self-Management and Plan Management	Kilometre	\$1.00	\$0.97

For Remote and Very Remote costs please contact us.

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## Goods & Service Tax (GST) and Pricing Changes

All NDIS funded supports provided by Trio Plan Management are GST free. The prices listed in this agreement may be adjusted periodically to reflect the NDIA's price changes. We will notify you when a price change occurs for supports you are receiving from Trio Plan Management, and we will work with you to ensure these changes have minimal impact on your service from us.

## Cancellations

We understand that, when engaging in Direct supports or making an appointment to contact Trio Plan Management, you will want to choose specific times of support that suit you and we are committed to providing support flexibly within standard business hours. We also recognise that you may need to cancel or change appointments from time to time. Our cancellation policy is in line with NDIS guidelines.

- △ If you need to cancel or change a scheduled support activity or appointment, we ask that you let us know 2 full business days before hand.
- △ We will try our best to reschedule the support activity or appointment to another time that works for you. Occasionally this may not be possible.
- △ When you do not provide the required notice, or do not attend your support activity or appointment, there will be a cancellation fee of 100% of the cost of the support.
- △ If you cancel frequently, we will review your support needs with you.
- △ If we need to cancel, we will not claim payment from your NDIS Plan and will try our best to reschedule with you.

When there are exceptional circumstances such as illness, hospitalisation, accident or other emergency it may be possible to waive the cancellation claim for the scheduled time.

## Changes to this Service Agreement

If you would like to make any changes to this Service Agreement, please contact us on (08) 6234 8333 during standard business hours or via [admin@trioplanmanagement.com.au](mailto:admin@trioplanmanagement.com.au). A new Service Agreement will then be made and agreed to by both parties.

This Service Agreement is based on your current NDIS Plan. You need to notify us if your NDIS Plan is reviewed, ended early or extended so that this Service Agreement can be adjusted as required.

## Ending this Service Agreement

Either party can end this Service Agreement at any time by giving 4 weeks' notice in writing.

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## Continuity of Supports

Trio Plan Management will notify you when an unavoidable interruption occurs, and we will ensure that you are made aware of any changes to your support arrangements with us.

In the event of an emergency or a disaster, including a pandemic, which impacts delivery of our supports to you, Trio Plan Management has contingency plans in place to provide continuity of your supports with us.

## Feedback, Complaints and Disputes

Your feedback, whether negative or positive, is important to us. Please let us know what you think about the support and services we provide to you. Your contributions will help us improve our services and ensure we meet your needs.

You can provide feedback by:

- △ Filling out the feedback form on the Trio Plan Management website ([trioplanmanagement.com.au](http://trioplanmanagement.com.au)).
- △ Emailing [admin@trioplanmanagement.com.au](mailto:admin@trioplanmanagement.com.au)
- △ Calling us on (08) 6234 8333 during standard business hours.

We will review your feedback and make sure you are contacted within 2 business days.

If at any time you would prefer to speak to someone outside of Trio Plan Management, you can contact the

### **NDIS Quality and Safeguarding Commission**

- △ Phone 1800 035 5444
- △ TTY 133 677
- △ Or via the NDIS Quality and Safeguarding Commission Complaint Contact Form at [ndiscommission.gov.au](http://ndiscommission.gov.au)

Further information is provided in the Feedback brochure in your welcome pack and on the Trio Plan Management website ([trioplanmanagement.com.au](http://trioplanmanagement.com.au)).