

SERVICE AGREEMENT & GENERAL TERMS & CONDITIONS

Document No: YPM_CS_F004



Your Plan Manager

your unique path, our personalised support

WELCOME!

Thanks for choosing Your Plan Manager.

We offer personalised plan management solutions and dedicated human support, informed by lived experience of disability, to help you navigate your unique path towards enhanced capacity and independence.

When you sign up with Your Plan Manager, we need to ensure you understand the responsibilities set out in this agreement for both yourself as the participant and us as your assigned plan management provider.

If you have questions or require assistance to complete this agreement, you can contact YPM using the following methods during business hours:

Phone us: 1800 968 775

Email us: plan@ypm.com.au

Visit us: 9A, 24 Corporation Circuit, Tweed Heads South, NSW 2486

Do you need the assistance of an interpreter or translator? Please refer to <https://www.tisnational.gov.au/>

If you ever have any feedback or suggestions on ways that we can improve, please let us know.

Your Sincerely,

Tanya Walford & the YPM Team

This Service Agreement (*Agreement*) is between: Your Plan Manager (*The Provider*) and You (*The Participant*).

An Authorised Representative of the participant may authorise this agreement on behalf of the participant where they are recognised by the NDIA or have been legally appointed to act on behalf of the Client. In which case, the terms and conditions set out in this Service agreement also apply to the Authorised Representative.

This Agreement commences on the date this form is completed and submitted to Your Plan Manager or the date that the form is completed online, and the terms & conditions are accepted by ticking the 'I accept' tick box. The agreement continues until such time that notice is given by either party to end this Service Agreement.

This Agreement has been prepared to outline the terms & conditions for which Your Plan Manager will provide services to the Participant as outlined in their NDIS plan. The NDIS is primarily funded through a combination of government revenue collected from taxpayers.

The NDIA funding model is designed to ensure that people living with a disability have access to the supports and services they need, while also balancing the financial contributions from governments and participants to sustain the scheme in the long term. To ensure sustainability, we are all obliged to abide by the Pricing Arrangements set by the NDIA.

1 PARTICIPANT DETAILS

Please make sure these details are the same as what the NDIA has on file.

Participant Full Name:	<input type="text"/>		
Preferred Name:	<input type="text"/>		
Date of Birth:	<input type="text"/>	Gender:	<input type="text"/>
Phone:	<input type="text"/>		
Email:	<input type="text"/>		
Street Address:	<input type="text"/>		
State:	<input type="text"/>	Post Code:	<input type="text"/>
NDIS Number:	<input type="text"/>		
NDIS Plan (start date):	<input type="text"/>	NDIS Plan (end date):	<input type="text"/>
NDIS Plan provided	<input type="checkbox"/> YES <input type="checkbox"/> NO		
How did you hear about us?	<input type="checkbox"/> Social Media <input type="checkbox"/> Google Search <input type="checkbox"/> Telemarketing <input type="checkbox"/> Word of Mouth		<input type="checkbox"/> Support Coordination Referral <input type="checkbox"/> Email <input type="checkbox"/> Event <input type="checkbox"/> Other (please state):
	<input type="checkbox"/> Phone <input type="checkbox"/> SMS <input type="checkbox"/> Email <input type="checkbox"/> Easy English		
Preferred Method of Communication:	<input type="text"/>		

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1.1 REIMBURSEMENT DETAILS

Please nominate an account for all reimbursements to be paid into. These details can be that of the Participant or Nominated Representative. We recommend that before purchasing items or services with your own funds, you should check if it is covered under your plan.

Name of Financial Institution:			
Account Name:			
BSB:		Account Number:	

2 PLAN NOMINEE / REPRESENTATIVE / GUARDIAN DETAILS

Please note: you can change or provide new consents at any time., For more information about legal consent, please refer to: [Consent forms | NDIS](#)

Full Name:			
Phone:			
Email:			
Relationship to Participant:			
Allow Access To:	<input type="checkbox"/> Dashboard	<input type="checkbox"/> Monthly Statements	
Consent to Share:	<input type="checkbox"/> YES	<input type="checkbox"/> NO	
Copy of Guardianship/Nominee documents provided (if applicable)	<input type="checkbox"/> YES	<input type="checkbox"/> NO	

3 SUPPORT COORDINATOR DETAILS (IF APPLICABLE)

Support Coordinator Name:			
Organisation:			
Phone:			
Email:			
Allow Access To:	<input type="checkbox"/> Dashboard	<input type="checkbox"/> Monthly Statements	
Consent to Share:	<input type="checkbox"/> YES	<input type="checkbox"/> NO	

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4 YOUR PLAN MANAGER SERVICE OPTION(S)

This Service Agreement is for a Participant on the NDIS (National Disability Insurance Scheme), and is made for the following services and supports:

- Plan Management**
- Capacity Building**

This Service Agreement is made for the purpose of providing supports under your NDIS plan. We agree that this service agreement is made in the context of the NDIS, which is a scheme that aims to:

- Support the independence and social and economic participation of people with disability, and
- Enable people with a disability, their families, and carers to exercise choice and control in the pursuit of their goals and the planning and delivery of their supports.

4.1 PLAN MANAGEMENT SERVICES

Plan Management – Financial Administration funding applies to registered Plan management providers who undertake financial administration of a NDIS plan on behalf of a participant. Plan Management funding includes a setup fee to establish the payment arrangements with providers and a monthly processing fee.

This support assists a participant by:

- Providing increased control over plan implementation and utilisation with plan financial intermediary services
- Managing and monitoring budgets over the course of the plan
- Managing NDIS claims and paying providers for delivered services, where compliant invoices are provided
- Maintaining records and providing regular statements showing the financial position of the plan
- Provide access to a wider range of service providers, including non-registered providers whilst remaining in line with the price limits contained within the Price Guide
- Provide you with access to support and coaching to help you maximise your NDIS Plan

You can read the **NDIS Guide to Plan Management** for more information about our role.

4.2 CAPACITY BUILDING SERVICES

- Assisting with developing a plan for budgets and spending
- Assisting with collation of receipts for the purpose of Self Directed STA programs
- Identifying and connecting suitable providers and team members with you
- Helping you establish suitable service agreements
- Develop budgets for individual services within each category of your plan
- Support you to build capacity and understanding in managing your plan
- Work within the funding of your supports and track time and billable hours
- Report to you periodically on the time taken for your Support Connection activities
- This does not include out of hours or weekend support

NOTE: As part of our agreement with you, all work related to providing Support Connection is billable and comes from a range of categories depending upon your budget. This includes direct and indirect services to achieve the participant's goals: face to face meetings, emails, phone calls, note taking/report writing and travel.

5 MANAGEMENT OF INVOICES

YPM (Your Plan Manager) will process invoices from your supports & services that:

- meet the guidelines of the Australian Tax Office (ATO)
- meet the guidelines of the NDIS
- are aligned with the goals and expectations of the NDIS plan
- have written approval or authority provided by an authorised NDIA delegate

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The participant or their provider may submit a compliant tax invoice to accounts@ypm.com.au for processing.

Where plan funding is available YPM will notify you via an automated email that you have invoice/s for approval. This is managed within the MYP Dashboard Portal. To ensure prompt processing and accuracy of your invoice, please visit the dashboard upon notification and review, approve or reject your invoice prior to the auto-approval stage overnight. **It is your responsibility to confirm and verify the details of your provider's invoice(s) such as the provider, the services provided, the dates those services were provided, and the amounts charged as agreed between you and your provider.** If you wish to opt-out, please notify our team. If you opt out, or do not approve or reject your invoices within the specified timeframe, we will not be responsible for charges incurred where providers submit invoices for services not provided or provided in error. All participants by default will be set up to approve invoices. If you would like to opt-out, please contact our team via email or phone.

Upon confirmation of a successful claim from the NDIA, the provider is paid the next business night in line with the payment obligations of a registered plan management provider.

5.1 EXHAUSTED FUNDING

YPM offers a monthly expenditure statement to allow participants to monitor the progress of their plan budgets. It is crucial for participants to review all spending to minimise the risk of exceeding plan funding limits. YPM does not assume responsibility for overspending in any category and bears no liability if it occurs. We will make efforts to contact the participant or their Support Coordinator if there is a risk of overspending. Additionally, participants can access the YPM Dashboard to track payments and fund balances in real-time.

In the event that the participant's funding is nearing exhaustion, we, as the service provider, commit to promptly reaching out and notifying the participant first **and affected service providers** to discuss potential options and next steps. This proactive approach ensures transparency and allows for appropriate planning to meet the participant's ongoing needs. By signing this agreement, you understand and agree to this occurring.

5.2 MANAGING PAYMENT DISPUTES (BETWEEN PROVIDER & PARTICIPANT)

In the event that a participant requests YPM to withhold payment to a provider due to a claiming issue or disagreement, YPM will attempt to honour the participant's request while the participant works with the provider to resolve the issue. Typically, participants and providers have agreed upon the delivery of supports in the service agreement. Withholding payment should only occur while actively resolving the issue, and both parties should have a dispute resolution process outlined in their service agreement. However, it is not reasonable to expect providers to carry a debt for an extended period, and participants should be aware that providers may pursue debt collection action to recover unpaid amounts if the issue persists and invoices remain unpaid.

5.3 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 your NDIS plan currently in effect under section 37 of the NDIS Act;
- Your NDIS plan is expected to remain in effect during the period the supports are provided; and
- You/your representative will immediately notify us if your NDIS Plan is replaced by a new plan or you stop being a participant in the NDIS.

6 MONTHLY STATEMENTS

Participants and their nominated representatives shall receive a monthly budget by email where an email address has been provided. A mailed copy of the monthly budget may be arranged with YPM.

Additionally, an up-to-date budget is available on the MYP dashboard portal that you and your nominated representatives can be provided access to. We recommend reviewing your monthly budget statement including invoices claimed, funding spent & balance remaining in your plan managed funding.

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7 RESPONSIBILITIES OF YOUR PLAN MANAGER (YPM)

As your dedicated service provider, we agree to:

- Treat you and your team with courtesy and respect and involve you and your team in decisions that affect your supports and services.
- Maintain accurate records regarding the supports delivered to you
- Provide online access and/or tools for the monitoring and management of your funding
- Operate within NDIA guidelines.
- Provide general guidance on the use of NDIS funding and request where required, request you to obtain authority or approval from a NDIA delegate.
- Request additional information to support your purchase(s) i.e. Letter of Support from an Allied Health Professional and/or the completion of a Decision Tool Form.
- Communicate with Service Providers when there is a risk of funds being exhausted to ensure ongoing support and action – we will notify you if/when this needs to occur
- Communicate openly using your preferred method of communication wherever practicable and in a timely manner.
- Listen to your feedback and resolve problems quickly.
- Rely on the information that you provide as being true, accurate, complete and current.
- Give you information about managing any complaints or disagreements, and details of our cancellation policy.
- Review your supports at least three (3) monthly and provide you with feedback and information.
- Give you the required notice if we need to end the service agreement (refer Ending this Service Agreement)
- Protect your privacy and confidential information as per the YPM privacy policy.
- Provide services in a manner consistent with all relevant laws, including the **National Disability Insurance Scheme Act 2013** and rules, and the Australian Consumer Law. These rules are continuously evolving, and we reserve the right to withhold payment for invoices where we require extra information or validation.

8 YOUR RESPONSIBILITIES (THE PARTICIPANT / NOMINEE)

As our valued Participant / Nominee, you agree to:

- Treat us with courtesy and respect.
- Provide details requested in this agreement including NDIS Plan, date of birth, address, contact details & nominated representatives we have asked for to enable us to provide effective service & to update YPM on any changes immediately to these details.
- Share your plan in the MyPlace Portal to allow the Plan Manager to review goals, budgets and any applicable nominee arrangements.
- Give us the required notice if you need to end the service agreement (refer to Ending this Service Agreement)
- Let us know immediately if your NDIS plan is suspended or replaced by a new NDIS plan, or you stop being a participant in the NDIS.
- Allow YPM to implement and manage Service bookings on the NDIA portal for funding up to the amounts specified in the support category and budget approved in your current NDIS Plan.
- Provide YPM with all service agreements that you have negotiated with your service providers to enable us to understand and assist with managing your NDIS funding.
- Confirm and verify the details of your provider's invoice(s) such as the provider, the services provided, the dates those services were provided, and the amounts charged as agreed between you and your provider.
- Indemnify us against purchases of supports and services made that are considered outside NDIS reasonable and necessary supports. Where required, YPM may request you obtain authority or approval from NDIA delegate to process such claims.
- Ensure receipts submitted for reimbursement are accurate, correct and include evidence of payment as per the NDIA rules.
- Your Plan Manager contacting the NDIA and Other Support Services providers, and collecting, using and disclosing your personal information (including sensitive health information) in the course of providing our

services to you. For more information about how we collect, use and disclose your personal information, please refer to our Privacy Policy (a copy of which can be obtained by contacting us).

9 FEES & PAYMENT TERMS

YPM will claim directly from the NDIA payment for the provision of supports as follows:

Plan Management – At the time of registration with YPM, there will be an initial setup fee charged per plan, followed by monthly fees billed on the first day of each subsequent month.

It is essential to note that these fees are fully funded by the NDIA, provided that Improved Life Choices are included in your plan upon request.

Capacity Building – Claim for services as outlined in the service agreement with the participant.

Where a price change is executed by the NDIA for services provided historically, fees will be backdated to support full recovery.

All supports and their prices are set out in the Line items for service. All prices are GST inclusive (if applicable) and include the cost of providing the supports.

9.1 LINE ITEMS FOR SERVICE

A schedule specific to your circumstances and plan will be provided for capacity building services. The NDIS periodically increases fees - usually on the 1st of July each year. By signing our Agreement, you understand that we will increase our fees in line with the NDIS price guide as and when this occurs.

Category	Support Line Item	Description	Price
Management of Funding for Supports in Participants plan	14_033_0127_8_3	One-off Setup fee for Financial Management Arrangements	As set yearly by the NDIA.
	14_034_0127_8_3	A Monthly fee for Financial Management of Funding Supports	As set yearly by the NDIA.
Capacity Building and Training in Self-management and plan management	01_134_0117_8_1	Capacity Building and Training in Self-management or Plan-management	As set yearly by the NDIA.
Assistance with decision making daily planning & budgeting	15_035_0106_1_3	Capacity Building – Assistance with Decision making, Daily planning and budgeting.	As set yearly by the NDIA.
Skill development and training including public transport training	15_037_0117_1_3	Capacity Building – Skill development and training	As set yearly by the NDIA.
Skill Development and Training	09_009_0117_6_3	Capacity Building – Skill development and training	As set yearly by the NDIA.

10 DURATION OF SERVICE AGREEMENT

Your Plan Manager may update this Service Agreement at any time. A downloadable version will be provided on the YPM website www.ypm.com.au and where practicable the Participant/Authorised Representative will be notified of any variations in writing.

This Agreement will become valid once the Participant or their authorised representative signs it below or accepts it online. It will remain in effect throughout the Participants relationship with Your Plan Manager until either party terminates it in accordance with section Ending this Service Agreement.

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11 ENDING THIS SERVICE AGREEMENT

Ending of supports will only happen if:

- We are unable to provide an appropriate service or support, or believe we are not the best provider for you, and/or
- You are dissatisfied with the service, and we are unable to address your requirements.

Should either party wish to end this service agreement they must give *30 days* notice in writing. We will not charge you for services that have not been provided. We will provide a warm introduction to your next Service Provider/s and ensure that all information that you consent to be shared is provided within 7 days of the end of the agreement. For urgent endings, we will do our best to provide information with urgency. If either party breaches this service agreement the requirement of notice will be waived.

12 YOUR CONSENT

To allow Your Plan Manager to provide the services under this agreement, you agree that YPM can:

- Access your personal & NDIS related information, including contacting the NDIA to obtain this information where required. This includes obtaining NDIS plans and funding information.
- Contact your Support Coordinator, Local Area Coordinator (LAC), NDIA delegate or representative to discuss your NDIS plan, funding, supports & services. This includes providing access to the online MYP dashboard and receiving monthly budget statements if requested.
- Use your information for administrative purposes & the daily operations of running our service
- Collect, use & disclose your information from and to relevant parties in accordance with our Privacy Policy. This includes the NDIA, NDS quality & safeguards commission or other government agencies.
- Connect you or your authorised representative with a third-party accreditation and legislative body for the purposes of audits & reviews. This may include being interviewed and having your records reviewed by such body. If you do not wish to participate in a third-party audit, please let us know.

13 PRIVACY & USE OF INFORMATION

Your Plan Manager collects your personal information from you and other parties for the purpose of providing services as set out in this agreement. To ensure the process of quality supports and services, information about you may be given to other service providers who also provide you services.

We have adopted the Australian Privacy Principles (APPs) contained in the Privacy Act 1988 (Cth) (the Privacy Act). The APPs govern the way in which we collect, use, disclose, store, secure and dispose of your Personal Information. If you would like a copy of our Privacy Policy, please contact us or download from our website.

All participants of YPM shall receive direct marketing & important NDIS information and updates from us. You agree that YPM can share your data with third-party service providers and partners for marketing purposes. You may unsubscribe from marketing material; however, it is important to note that we use this type of communication to update you and your authorised representative on important information pertaining to the NDIS and your NDIS funding.

14 ADVOCACY

We support the use of advocates and encourage you to seek the services of advocates to support your planning and engagement of services. If you would like more information about how an advocate can assist you, please let us know. To find the locations and contact details of government-funded independent advocates near you, go to [Ask Izzy](#) as recommended by the NDIS.

If you request one of our staff to be an advocate, we will record their authority along with the issues important to them.

15 FEEDBACK, COMPLAINTS & DISPUTES

If you or your authorised representative wish to give Your Plan Manager feedback, or a complaint about the provision of supports, please use one of the following methods:

1. **Complete our form online:** Feedback & Complaints Form
2. **Call:** 1800 968 775 and ask to provide feedback or a complaint to the Business Services Manager
3. **Send an email to:** feedback@ypm.com.au
4. **Visit us at:** 9A, 24 Corporation Circuit, Tweed Heads South, NSW 2486
5. **Mail to:** PO Box 6323 Tweed Heads South, NSW 2486

We may contact you or your authorised representative in relation to feedback or complaint lodged within 48 hours. All matters are treated with confidentiality and in line with our privacy policy. Your Plan Manager sees all feedback as an opportunity to grow, improve, and ultimately provide you with better service.

If you are dissatisfied with the solution, or do not wish to contact the Business Services Manager, a complaint can be made to the **NDIS Quality & Safeguards Commission** by:

Phone: 1800 035 544 (free call from landlines)

TTY 133 677. Interpreters can be arranged.

National Relay Service and ask for 1800 035 544.

Completing a complaint contact form.

The NDIS Commission can take complaints from anyone about:

- NDIS services or supports that were not provided in a safe and respectful way
- NDIS services and supports that were not delivered to an appropriate standard
- How a NDIS provider has managed a complaint about services or supports provided to a NDIS participant

Please visit <https://www.ndiscommission.gov.au/about/complaints> for more information.

16 GLOSSARY OF TERMS

This Agreement uses words that have specific meaning:

NDIS/NDIA	NDIS – National Disability Insurance Scheme, established by the NDIA – National Disability Insurance Agency, which are the parent company. They run the NDIS.
NDIS Plan	The written document developed between the participant and the NDIA. It outlines the funding allocated within approved support categories and provides information on what the funding is intended to be used for.
Your Plan Manager / YPM	Your Plan Management Pty Ltd is a Registered NDIS Provider of Support under the National Disability Insurance Scheme Act 2013 (cth) . We are referred to as Your Plan Manager or YPM in this agreement.
Participant	The Person the NDIS Plan was developed for.
Plan Management	Also referred to as “Improved Life Choices” in a NDIS Plan, Plan Management is the service provided by Your Plan Manager.
Provider	A provider is a Sole Trader or Organisation delivering support services and/or products to a NDIS Participant.

Authorised Representative	An Authorised Representative of the participant as recognised by the NDIA or have been legally appointed to act on behalf of the Client.
Support Coordination	Also referred to as “Coordination of Supports” in a NDIS Plan, Support Coordination is a service provided by an external third party to the Participant.

17 AGREEMENT SIGNATURES


The Parties agree to the terms and conditions of this Service Agreement including a consent to share information.

By ticking the box on the sign-up page, you agree to the terms and conditions as outlined in this service agreement. If you do not understand any section of this agreement, please talk to a family member, your nominee / representative / guardian or contact yourteam@ypm.com.au to obtain further clarity before acknowledging consent.

By signing the form below, you agree that you and/or your carer/guardian/nominee:

- have read the above information and understand the reasons for the collection of your personal information and the ways in which the information may be used and disclosed and agree to that use and disclosure.
- understand that it is your choice as to what information you provide, and that withholding or falsifying information might act against the best interests of the supports and services you receive.
- are aware that you can access your personal information on request if necessary, and correct any information you believe to be inaccurate.
- understand that if, in exceptional circumstances, access is denied for legitimate purposes, that the reasons for this and possible remedies will be made available to you.
- have been provided with or have been given an opportunity to obtain a copy of the privacy policy.
- understand that the provider is not available outside the hours of 9am to 5pm Monday to Friday. Note that calls made outside these hours - including on weekends and in case of emergency – will not be answered until the next business day.

If you cannot sign, please complete your name and date.

Signature of Participant/Nominee:	
Name of Participant/Nominee:	
Date:	
Signature of Authorised Person from YPM:	
Name of Authorised Person from YPM:	Nicole Black

Please remember to attach or provide a copy of the NDIS plan including goals and budget items. This can be provided by screenshot or email. **We cannot commence your service without a current NDIS plan.**

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18 APPENDICIES

[Decision Tool for Everyday Items / Consumables up to \\$1500](#)

[Consent Form NDIS](#)

