

EASY READ

**SERVICE AGREEMENT &
GENERAL TERMS & CONDITIONS**

Document No: YPM_CS_F005



Your Plan Manager

your unique path, our personalised support

1 HOW TO USE THIS DOCUMENT

This easy read document is a summary of the YPM Service Agreement.

We have written this document in an easy-to-read way and have used pictures to explain.

If there are any differences between the YPM service agreement and this easy read version, you should always follow the YPM Service Agreement.

You can ask for help to read this document. A friend, family member or support person may be able to help you.

2 WELCOME

Welcome to **Your Plan Manager**. We are also known as **YPM**.

CONTACT US



1800 968 775



plan@ypm.com.au



9A, 24 Corporation Circuit,
Tweed Heads South NSW 2486

THIS SERVICE AGREEMENT IS BETWEEN:



Your Plan Manager

YOUR PLAN MANAGER

And



YOU

YOU may be the NDIS Participant, or someone authorised to act on behalf of the NDIS participant and agree to the Service Agreement.

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3 PARTICIPANT DETAILS

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

Participant Full Name:			
Preferred Name: <i>(if applicable)</i>			
Date of Birth:		Gender:	
Phone:			
Email:			
Street Address:			
State:		Post Code:	
NDIS Number:			
NDIS Plan (start date):		NDIS Plan (end date):	
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"/> Support Coordination Referral
	<input type="checkbox"/> Google Search		<input type="checkbox"/> Email
	<input type="checkbox"/> Telemarketing		<input type="checkbox"/> Event
	<input type="checkbox"/> Word of Mouth		<input type="checkbox"/> Other (please state):
Preferred Method of Communication:	<input type="checkbox"/> Phone		
	<input type="checkbox"/> SMS		
	<input type="checkbox"/> Email		
	<input type="checkbox"/> Easy English		

3.1 BANK DETAILS

We will need your bank details to reimburse you for approved purchases.

Name of Bank:			
Account Name:			
BSB:		Account Number:	

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4 PLAN NOMINEE / REPRESENTATIVE / GUARDIAN DETAILS

Full Name:

Phone:

Email:

Relationship to Participant:

Allow Access To:

Dashboard

Monthly Statements

Consent to Share:

YES

NO

Copy of Guardianship documents provided (if applicable)

YES

NO

5 SUPPORT COORDINATOR DETAILS (IF APPLICABLE)

Support Coordinator Name:

Organisation:

Phone:

Email:

Allow Access To:

Dashboard

Monthly Statements

Consent to Share:

YES

NO

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6 YOUR PLAN MANAGER SERVICE OPTION(S)

This Service Agreement is for YPM to provide you with:



Plan Management Services

OR



Capacity Building Services

6.1 PLAN MANAGEMENT SERVICES



Plan Management is:

When the NDIS provides funding in your NDIS plan for all or part of your budgets to be plan-managed. A plan manager:

- Allows you to use registered or non-registered providers
- Pays your providers from plan managed NDIS funds
- Helps you understand and manage your NDIS funds

You can read the Easy read – NDIS guide to Plan Management to help you understand what a plan manager does.

6.2 CAPACITY BUILDING SERVICES



Capacity Building is:

When additional support is required, you and YPM will make an agreement for these additional services. These could be for:

- Helping you set up your providers
- Develop a budget plan for your NDIS funding
- Train and support you to build capacity

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7 PAYING YOUR PROVIDERS

YPM will process your provider invoices that:



Meet ATO guidelines



Are goals in your NDIS plan



Meet NDIS guidelines



Are approved by NDIS

Email invoices to: **accounts@ypm.com.au**



You can choose to approve your invoices

OR



You can ask us to automatically approve your invoices



When the NDIA have confirmed the invoice YPM will pay the provider the next business night.

7.1 EXHAUSTED FUNDING



Check Your Spending

- YPM gives you a monthly statement to see how much money you have spent
- It's important to check your spending so you don't run out of money.



YPM's Role

- YPM is not responsible if you spend too much.
- We will try to contact you if you are spending too much money.



Tracking Your Money

You can use the YPM Dashboard to see your payments and money in real-time.



If You Are Running Out of Money

- We will let you know quickly if your money is running low.
- We will talk with you and your service providers about what to do next.



Agreement

By signing, you agree to this plan.

7.2 MANAGING PAYMENT DISPUTES (Between your provider and you)



When There is a Disagreement About Payment

Sometimes, you might have a problem with a provider and not want to pay them.



What YPM Will Do

You and the provider should have a plan in your service agreement for solving problems.



Resolving the Issue

You should work with the provider to fix the problem quickly.



Important to Know

- Providers cannot wait a long time for payment.
- If the problem is not fixed and you don't pay, the provider may take action to get their money back.



Agreement

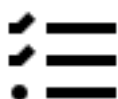
Make sure you understand and agree to this plan.

7.3 GOODS AND SERVICES TAX (GST)



About GST

GST is a tax on goods and services.



What You Need to Know

- The support you get in this service agreement are necessary and approved by the NDIS.
- Your NDIS plan must be active while you get these supports.
- Tell us right away if your NDIS plan changes or if you leave the NDIS



Agreement

Make sure you understand and agree to this plan.

8 MONTHLY STATEMENTS

We will email you a budget report if we have your email address.



We can mail you a budget report if you don't have email. Ask us how.

8.1 MYP DASHBOARD

We will email you a budget report if we have your email address.



We can mail you a budget report if you don't have email. Ask us how.



YPM recommends you check your invoices and NDIS budgets regularly

9 RESPONSIBILITIES OF YPM



Treat you with courtesy and respect and listen to you



Follow NDIS guidelines



Keep accurate records and help you understand your NDIS plan



Help you find information

10 YOUR RESPONSIBILITIES



Treat us with courtesy and respect



Give us all relevant details of your plan including a copy of your full NDIS plan



Check your invoices regularly and talk to us if something isn't correct



Let us know if there are changes with your NDIS plan



Spend your NDIS funding as described in your NDIS plan and NDIS guidelines.

11 HOW TO PAY YPM



YPM will claim plan management fees directly from the NDIA:

- At the start of the agreement, then
- On the first business day of each month

YPM will claim capacity building fees as set out in a service agreement with you.

If the NDIA change their prices for fees, we will also change our prices to match.

12 DURATION OF SERVICE AGREEMENT



- YPM may make changes to the Service Agreement any time.
- You can ask for a copy or download from our website.
- We may also email you with these changes

13 ENDING THIS SERVICE AGREEMENT



- You agree to give 30 days notice in writing to end the service agreement
- YPM agrees to give 30 days notice to end the service agreement

14 YOUR CONSENT



You agree that YPM can:

- Talk to the NDIA about your plan and funding
- Talk to your Support Coordinator, LAC or other NDIA person about your plan
- Collect, use and disclose your information where appropriate and following the rules in the Privacy Policy.

15 YOUR PRIVACY



- Your privacy is important to YPM. We have a Privacy Policy you can read.
- If there are details you don't want to share please talk to us
- We will send you newsletters and important information by email. You can unsubscribe if you don't want to receive this information.

16 ADVOCACY

If you need support from an advocate you can go to <https://askizzy.org.au/disability-advocacy-finder>

17 FEEDBACK, COMPLAINTS & DISPUTES



You can give feedback or make a complaint to YPM by:



Complete our form online: Feedback & Complaints Form



Call: 1800 968 775 and ask speak to the Business Services Manager



Send an email to: feedback@ypm.com.au



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



Mail to: PO Box 6323 Tweed Heads South, NSW 2486

If you are not satisfied with YPM you can make a complaint 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](#).

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

18 WORDS OR TERMS WE HAVE USED IN THIS AGREEMENT

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.
You	The participant or the authorised person who can act on behalf of the participant.

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19 AGREEMENT SIGNATURES

When you sign this agreement OR tick the box on the sign-up page you agree to the terms and conditions as outlined in the Service Agreement.

Remember, you can ask someone for help to understand what you are agreeing to.

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:	<i>NBlack</i>
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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