



PMAbility

Plan Management Service Agreement Nov 2023

Table of Contents

I.	Easy English Summary of your Service Agreement	2
II.	Your Service Agreement	4
	What is a Service Agreement?	4
	Parties to Agreement (Signatures)	4
	Contact details	5
	How is my privacy and confidentiality maintained?	5
III.	Mission Statement	6
IV.	Our Values	6
V.	Description of Business.....	6
	Plan Management.....	6
	Our Web Portal.....	7
	Service Obligations	8
	What can you expect from PMAbility?	8
	What does PMAbility expect from me?	8
	Changes to the Agreement	9
	Ending the Agreement.....	9
	How do I provide feedback or make a complaint?	9
	Location.....	9
	Hours of Operation.....	9
	Keep You Informed	10
	Goods and services tax (GST)	10
VI.	Appendix.....	11
	Schedule of Fees (as at 2023/2024 NDIS Price Guide)	11
	Service claiming types:.....	11

Easy English Summary of your Service Agreement



A Service Agreement is a document.
It is for you and your service provider.
The service provider is the person or organisation that provides you with supports.



The document says that you both agree about the services you are going to receive.
When you have agreed, you both sign the document. See page 4.



If you would like any more information about Service Agreements, you can contact us via website:
www.pmability.com.au
Email: admin@pmability.com.au



Your NDIS Plan explains what you want to do and what your goals are.
And it explains the support you will need to achieve your goals.
One of the big ideas behind the NDIS is that you have choice and control about the support that you use.
This service agreement supports the goals in your Plan and helps you get choice and control.



You get to choose who provides your supports. And you get to choose how you receive supports.
Our job is to help you pay your supports from your Plan funding.



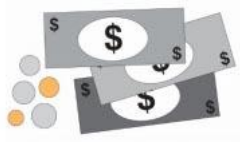
Having a Service Agreement is a helpful way to make sure you have everything in writing if any problems occur.

Don't forget to keep a copy of this Service Agreement in a safe place. Maybe keep a copy of your Plan with it also.



We cover what supports you will receive.

When where and how you will receive those supports.



We tell you how much the supports will cost and how they will be paid for.

We also let you know how long you can have these supports for.



How you can end or change the Agreement.

We explain this in more detail on page 8.

What you can do if any problems occur?

We explain this in more detail on page 8.



What is expected of your service provider?

This we list as our responsibilities.

We explain this in more detail on page 7.



When you sign the Service Agreement, it means that you agree to do the things that are expected of you.

This is about your responsibilities.

We explain this in more detail on page 8.



Your responsibilities include things like:

Telling PMAbility about the supports that you want, and how you want to receive them.

Being polite and respectful to PMAbility staff who work with you.



Telling PMAbility if you've got any problems.

Telling us if you can't make it to an appointment – you should always give us at least 24 hours' notice.

Your Service Agreement

PMAbility is a Plan Management Agency with the NDIS, offering Participants support with financial and intermediary service activities (Improved Life Choices category in the Price Guide). We offer specialist support in NDIS related matters, such as claiming from the NDIS portal on your behalf, interpreting budgets in NDIS plans, and accessing the NDIS Price Guide to ensure all claims are processed successfully.

We operate according to Section 42 (1) of the NATIONAL DISABILITY INSURANCE SCHEME ACT 2013 which states that the plan management provider is to receive the Agency funding on behalf of the Participant, to purchase the planned supports and to manage and acquit the funding provided.

What is a Service Agreement?

A Service Agreement is a document for the Participant and Service Provider. It outlines how they will work together to achieve goals in the NDIS plan. A Participant may choose to have a representative (someone close to them such as a family member or friend, or a Nominee on their NDIS plan) to sign the agreement.

Parties to Agreement (Signatures)

**Participant or
Participant's Representative**

And

**Provider
PM Ability (ABN 70472133884)
Anh Vo
Principal Consultant**

This Service Agreement will commence on: _____

for the period: _____ to: _____

A review of the plan will take place on _____

by the National Disability Insurance Agency (NDIA).

Contact details

I, _____ the Participant or the Participant's representative can be contacted on:

Phone (A/H): _____ Phone (B/H): _____

Mobile: _____ Email: _____

Residential Address:

Alternative

Contact Person: _____

Phone (A/H): _____ Phone (B/H): _____

Mobile: _____ Email: _____

How is my privacy and confidentiality maintained?

PMAbility respects a Participant's right to privacy and is committed to safeguarding any personal information provided to us. Please see our Privacy Statement on our website (www.pmability.com.au/docs/priv.pdf).

Yes No I have reviewed and read the Privacy Statement (on website) and I understand the information it contains.

Yes No I give PMAbility permission to share my information with certain people in my plan for them to pay for my services.

Yes No I agree PMAbility can record my information so that they can provide services to me.

Yes No I consent to giving PMAbility access to my support logs if required.

Yes No I consent to giving PMAbility access to my monthly statements if required.

Mission Statement

We seek to provide a mechanism for people to manage their funds to a set budget. We provide a customised approach, with visual reminders and graphics representation of their spending patterns.

Our Values

Respect

We respectfully encourage each person to exercise choice and control and respect the diversity of each individual's needs.

Empowerment

We actively listen to better understand individual needs and expressed aspirations, maximising independence and building confidence and capacity

Integrity

We are open, professional, authentic and fair in everything we do.

Description of Business

Plan Management

We offer an advanced secure online system, which allows you to customise your experience and provide you with the appropriate information to manage your budget. This approach allows the flexibility to operate within the NDIS funding model. We aim to work with you to better understand what is involved in managing your funds.

We support the individual's ability to:

- ✓ make informed decisions;
- ✓ understand and meet accountability requirements, and other critical risk areas;
- ✓ expend funds in accordance with the approved plan strategies.

The National Disability Insurance Scheme (NDIS) is changing the way people with disabilities receive government support and funding, giving people more power over the way they can work towards achieving their goals. Starting and managing an NDIS plan can be stressful and confusing. It is our mission to offer individualised supports, in meaningful and transparent ways, so that the initial complexities and ongoing responsibilities of being an NDIS participant don't get in the way of people living their best life.

As an NDIS participant, people have three main options: Agency, Self or Plan managed, though a plan may include a combination of these choices. As a plan managed participant, people may choose the services

they use, the providers they engage, and how much of their budget they will allocate for them. Every participant maintains total control over when and how those services are delivered. By choosing to be plan managed with PMAbility, participants gain access to leading edge technology and a wide range of supports.

Being agency managed comes with the restriction of only being able to choose registered providers. With a plan manager, participants are able to choose any relevant service provider, both registered and non-registered – whatever works best for them.

PMAbility's support focuses on strengthening the participant's ability to undertake tasks associated with the management of their supports. This includes building financial skills, organisational skills, and enhancing the participant's ability to direct their supports and/or develop self-management capabilities. Plan management is the overall management of the plan and includes assisting the participant to select providers, develop service agreements, paying providers, developing monthly statements for participants and claiming payment from the NDIA.

Our Plan Managers will assist the participant to develop their skills for self-management in future plans, where this is possible. Funding for plan management includes an establishment fee and payments at an hourly rate for completing this work.

Financial Intermediary funding applies to registered providers who undertake financial assistance for the payment of providers on behalf of a participant. Financial Intermediary funding includes a setup fee to establish the payment arrangements with providers and a monthly processing fee. The processing fee is for transaction processing and provider liaison during the month. A financial intermediary will typically possess bookkeeping / accounting skills and have systems in place for efficiently processing payments on behalf of a participant. When an invoice for a delivered support has been received by a financial intermediary, payment can be requested from the NDIA and paid to the provider after the claim has been processed.

Our Web Portal

This is via a secure members only area which can be accessed with a unique email address and password. It can be seen at our website (<https://www.pmability.com.au>). You can use this platform to load manual claims (reimbursements) for items you have paid for (eg taxi, or gloves etc) and then get paid back via your NDIS plan. Or you can load invoices yourself onto the portal. Or you can simply forward an invoice to claims@pmability.com.au (or even your providers can email directly to this email address). If using claims email address it is very important to ensure that the participant name and NDIS number are in the subject line to ensure that it is processed in a timely manner. If we have to go looking through the invoice to find the details and maybe go back to the supplier if not clearly identified who the job was for this will delay payment.

Our usual turnaround time for manual claims will be 5 weekdays, for invoices we say 7 weekdays.

At anytime you can login to the members portal and check your claims and even setup and monitor your own budget. You can setup limits for authorisation, so if a supplier sends in an invoice for over say \$1000 you can say you want to check this before being submitted to the NDIS. Everything less than \$1000 will

automatically go through to NDIS. If we are also providing Support Coordination for you, you will receive every invoice and be asked to approve it, regardless of this authority limit as we do not want anyone feeling that we are using your NDIS funds to pay ourselves.

Service Obligations

As part of this service agreement there are certain rights and responsibilities on both parties.

What can you expect from PMAbility?

- Treat the Participant with courtesy and respect;
- Work with the Participant to provide supports in a manner that suits their needs;
- Consult the Participant on decisions and how supports are provided;
- Communicate openly and honestly and in a timely manner;
- Listen to the Participant's feedback and resolve problems quickly;
- Notify the Participant about the process for managing complaints or disagreements;
- Keep clear, timely and accurate records on the supports provided;
- Protect the Participant's private and confidential information;
- Operate under any relevant privacy requirements;
- Operate in accordance with NDIS Conflict Of Interest Policy and staff / NDIS Code of Conduct;
- Provide supports consistent with all relevant laws including the National Disability Insurance Scheme Act 2013 and rules, and the Australian Consumer Law;
- Review the provision of supports every 12 months, or sooner if necessary;
- Where possible, give the Participant a minimum of 24 hours' notice if PMAbility has to change a scheduled appointment to provide supports and, if notice is not provided, the conditions in "Changes to this Agreement" (as set out below) will apply;
- Give the Participant the required notice if PMAbility needs to end the Service Agreement (see "Ending this Agreement") as set out below.

What does PMAbility expect from me?

- Work cooperatively with PM Ability to ensure that services and supports are delivered to meet my needs
- Treat PM Ability (and those involved in the delivery of my supports) with courtesy and respect
- Notify PM Ability of any changes to my situation that I expect will have an impact on this Agreement
- Discuss with PM Ability any concerns I have about the services or supports being provided
- Where possible, give PM Ability 24 hours' notice if I cannot make a scheduled appointment. If notice is not provided, the conditions in "Changes to the Agreement" (below) will apply.
- Give PM Ability the required notice to end the Service Agreement should I wish to cease the Agreement. See "Ending the Agreement" (below).
- Notify PM Ability immediately if my NDIS plan is suspended or replaced by a new NDIS plan, or I stop being a participant in the NDIS.

Changes to the Agreement

If the Participant, or PMAbility, need to change when, or how, supports are to be provided, both parties agree to give 24 hours' notice where possible. If changes to the supports or their delivery are required, parties agree to discuss and review the Service Agreement. Parties agree that any changes to this Agreement will be in writing, signed and dated by all parties.

Ending the Agreement

Should either party wish to end this Service Agreement, both must agree to give 2 weeks' notice where possible. Ending the Agreement by either party must be done in writing. If either party fails to meet their responsibilities or the terms set out in this agreement, or where there is a risk to the safety of staff or the Participant, then the requirement of notice will be waived. This complies with the National Disability Insurance Scheme Terms of Business for Registered Providers, withdrawal, or termination of services provisions.

How do I provide feedback or make a complaint?

If the Participant wishes to give feedback to the Provider, the Participant can contact PMAbility by emailing PMAbility (admin@pmability.com.au) or by going to the feedback section of PMAbility's website (<http://www.pmability.com.au/contact/>).

If the Participant is not satisfied or does not wish to contact us in person, the Participant can contact the National Disability Insurance Agency by calling 1800 800 110, visiting a NDIA office, or by going to the NDIS website (www.ndis.gov.au). Complaints can also be lodged with the NDIS Quality and Safeguards Commission via their website (<https://www.ndiscommission.gov.au/about/complaints>). Please feel free to check out our Complaints / Compliments Management Policy to see how we respond to your feedback.

Location

The business is run from our headquarters in Beechboro. The primary contact with customers will be online and via electronic communication. The website will be the primary tool for accepting information and providing information back. With secure login accounts participants will receive customised displays of their information that we are handling for them (dashboard).

Hours of Operation

Due to the online nature and likelihood of when customers are likely to want to review or provide their information, such things as emails / notices and website updates will need to be performed basically 24/7. So, no specific "open for business" hours, as work may well come to us on weekends or evenings when customers are having downtime from their other duties and wanting to provide or review their information. It will be a policy of the business to answer emails sent before 12pm on the same day, otherwise after this before 12pm the next day (week or weekend).

We operate according to Section 42 (1) of the NATIONAL DISABILITY INSURANCE SCHEME ACT 2013 which states that the plan management provider is to receive the Agency funding on behalf of the participant, to purchase the planned supports and to manage and acquit the funding provided.

Keep You Informed

It is acknowledged that keeping our name in front of our customers is important and will provide a newsletter and will send out occasional informative articles either via news or a website blog. Posting information on a blog is always a good way to have updated information and activity on your website, which will in return mean search engines like Google will find your website.

We will also take the opportunity to network in person at specific functions or events that will attract customers. The NDIS engagement team also produces a newsletter to Participants and Providers which we might be able to advertise our service in. We might also attend NDIS Provider Expo's where Participants (and NDIS staff) can come and see what we do.

Goods and services tax (GST)

For the purposes of GST legislation, 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, in the Participant's NDIS plan currently in effect under section 37 of the NDIS Act.
- The Participant's NDIS plan is expected to remain in effect during the period the supports are provided.
- The Participant will immediately notify PMAbility if the Participant's NDIS plan is replaced by a new plan or the Participant stops being a participant in the NDIS.

Appendix

Schedule of Fees (as at 2023/2024 NDIS Price Guide)

	National	Remote	Very Remote
Plan Management - Monthly Fee	\$104.45	\$146.23	\$156.67
Plan Management - Set Up Costs *	\$232.35	\$325.29	\$348.54

* Note: Only charged once per NDIS Plan at setup of your first agreement with us, extended plans are excluded as they are technically the same plan number.

Service claiming types:

Plan Management - set up costs	A one-off setting up of the financial management arrangements for managing of funding of supports.
Plan Management – monthly fee	A monthly fee for the ongoing maintenance of the financial management arrangements for managing of funding of supports.