



## Service Agreement for Provision of Financial Intermediary Services

### Parties

This Service Agreement is between **OnTime Plan Services** and the NDIS **Participant or their 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 OnTime Plan Services, or until we are notified otherwise in writing by the Participant or their nominated representative.

Participant:

and Participant Representative (if involved):

Participant's NDIS number:

Date of birth:

Address:

& Provider: **OnTime Plan Services**

### Contact details

The Participant or nominated representative can be contacted on:

Phone:

email:

The provider can be contacted on:

Phone: 03 5446 5400

email: [hello@ontimeplanservices.com.au](mailto:hello@ontimeplanservices.com.au)

### The NDIS and this service agreement

OnTime Plan Services agrees to provide the Participant with financial intermediary services. The supports and their prices are set out in the attached Schedule of Supports. All prices are GST inclusive (if applicable) and include the cost of providing the supports. Additional expenses (i.e. things that are not included as part of a Participant's NDIS supports) are the responsibility of the Participant/nominated representative and are not included in the cost of the supports.

This Service Agreement is made for the purpose of providing supports under the

participant's National Disability Insurance Scheme (NDIS) plan.

**A copy of the participant's NDIS plan should be attached to this service agreement.**

The parties 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 to exercise choice and control in the pursuit of their goals and the planning and delivery of their supports.

## **Schedule of supports**

OnTime Plan Services agrees to provide the Participant with financial intermediary services. The supports and their prices are set out in the attached Schedule of Supports. All prices are GST inclusive (if applicable) and include the cost of providing the supports.

Additional expenses (i.e. things that are not included as part of a Participant's NDIS supports) are the responsibility of the Participant or nominated representative and are not included in the cost of the supports.

## **Responsibilities of Provider**

Where provisions are in a participant's plan, OnTime Plan Services agrees to:

- *provide financial intermediary services including:*
  - *paying supplier invoices on behalf of client*
  - *processing client reimbursement claims*
  - *track expenditure against client budget*
  - *reconcile client balances and provide monthly statements of expenditure and available funding upon request*
- *provide training to strengthen the participant's ability to undertake tasks associated with the management of their supports including:*
  - *building financial skills*
  - *organisational skills*
  - *enhancing the participant's ability to direct their supports*
  - *develop self-management capabilities*
- *assist with purchases where appropriate.*
- *liaise with clients via their preferred method (if practical) whenever required.*
- *communicate openly and honestly in a timely manner*
- *treat the Participant or nominated representative with courtesy and respect*
- *listen to any feedback and resolve problems quickly*
- *give the participant information about managing any complaints or disagreements*
- *protect the Participant's privacy and confidential information as per OnTime Plan*

## Responsibilities of the Participant or their chosen representative.

I agree to:

- *provide information as requested by OnTime Plan Services in a timely manner*
- *treat OnTime Plan Services staff with courtesy and respect*
- *discuss any concerns about our service with OnTime Plan Services at the earliest opportunity.*
- *advise OnTime Plan Services 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.*
- *give OnTime Plan Services the required notice if the participant needs to end the service agreement (see ['Ending this Service Agreement'](#) below for more information),*
- *upon acceptance of this Service Agreement, the Participant/nominated representative, will provide their NDIS plan details, and NDIS Number to OnTime Plan Services.*

## Payments

OnTime Plan Services will claim directly from the NDIA, an agreed monthly fee for the provision of support as agreed in Schedule of Supports – Improved Life Choices (Support Category 14), upon acceptance of the Service Agreement.

By nominating OnTime Plan Services to provide plan management services and manage the funding we will claim from the NDIA portal for funding up to the amounts specified in the support category and budget approved in the Participant's current NDIS plan.

After the supports are delivered, the service provider or Participant/nominated representative will claim payment or reimbursement for those supports from OnTime Plan Services by forwarding an itemized invoice or receipt to:  
[accounts@ontimeplanservices.com.au](mailto:accounts@ontimeplanservices.com.au).

If an invoice requires approval before payment, notice will be given via an email or our phone app requesting approval or decline. If no answer is received within 3 business days, the invoice will automatically be approved and paid.

## Ending this Service Agreement

Should either party wish to end this service agreement they must give 1 months' notice. If either party seriously breaches this service agreement the requirement of notice will be waived.

## Feedback, complaints and disputes

If the participant wishes to give the provider feedback, or is not happy with the provision of supports and wishes to make a complaint, the participant can talk to Mr. Rod McNeill on 03 5446 5400 or email [hello@ontimeplanservices.com.au](mailto:hello@ontimeplanservices.com.au) or post to PO Box 1202, BENDIGO, VIC 3552.

If the participant is not satisfied or does not want to talk to this person, the participant can contact the National Disability Insurance Agency by calling 1800 800 110, visiting one of their offices in person, or visiting [ndis.gov.au](http://ndis.gov.au) for further information.

## 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 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.

## Agreement signatures

The Parties agree to the terms and conditions of this Service Agreement.

Participant/ Representative Signature:

Name:

Date:

**Unless advised otherwise, we will share details of your NDIS funds with your Support Coordinator to help them to help you. If you don't want your funding details shared, please tick the box to opt out of this.**

Do not share my details with my Support Coordinator.

**I would like my invoices:  approved automatically,  approved by myself via email,  approved by myself via the app. (Please select as applicable)**

Signed on behalf of OnTime Plan Services:

Name of authorised person: Rod McNeill



## Attachment – Copy of Participant’s NDIS plan

Please attach a copy of the participants latest NDIS plan

## Attachment – Schedule of supports

These are standard National prices and different prices may apply to remote or very remote clients.

### Schedule of supports :

Support Item	Description of support	Price Limit (2024/2025 FY)
<b>Plan Management and Financial Capacity Building - Setup Costs</b> (14_033_0127_8_3)	A one-off (per plan) establishment fee for setting up of the financial management arrangements for managing of funding of supports	\$232.35 set-up fee (if included in your plan)
<b>Plan Management Financial Administration</b> (14_034_0127_8_3)	A monthly fee for the ongoing maintenance of the financial management arrangements for managing of funding of supports	\$104.45 per month
<b>Capacity Building and Training in Self-Management and Plan Management</b> (01_134_0117_8_1)	Capacity Building and Training in Self-Management and Plan Management	\$77.00 per hour (upon request).
<b>Assistance With Decision Making Daily Planning and Budgeting</b> (15_035_0106_1_3)	Assistance With Decision Making Daily Planning and Budgeting • Provision of time limited support to assist a person to develop and maintain daily budget, including assisting in planning purchases	\$67.56 per hour (upon request).
<b>Provider travel- (non-labour costs)</b> (14_799_0127_8_3) or (01_799_0117_8_1) or (15_799_0106_1_3)	If we travel to deliver Face-to-Face supports to a participant, non-labour costs such as road tolls, parking fees and the running costs of the vehicle, may be charged to your NDIS plan.	\$1.00 per kilometre plus any additional costs. (upon request).