

**first choice**

**PLAN MANAGEMENT**

## **Plan Management Service Agreement Online / Website Sign Up Version**

This Plan Management Service Agreement is between the Participant

and First Choice Allied Health Services Pty Ltd  
t/as First Choice Plan Management

First Choice Allied Health Services Pty Ltd  
Office Phone: 08 8490 8719  
Office Address: 217/219 Flinders Street, Adelaide SA 5000  
PO Box 248, Hove SA 5048  
E: [info@firstchoiceplan.com.au](mailto:info@firstchoiceplan.com.au)  
ABN 55 644 623 576  
[www.firstchoicealliedhealth.com.au](http://www.firstchoicealliedhealth.com.au)



# Plan Management Service Agreement

This Plan Management Service Agreement is for Participants entering into a Plan Management Agreement with First Choice Allied Health Services Pty Ltd trading as First Choice Plan Management.

First Choice Allied Health Pty Ltd trading as First Choice Plan Management (ABN 55 644 623 576)  
Registered NDIS provider registration number is 4050081112.

Prior to signing this service agreement, First Choice Plan Management have provided the participant and / or nominated representative via our website:

- explain the services provided by First Choice Plan Management;
- explain the choices available to the Participant in regards to their NDIS Plan;
- establish the expectations and explain the supports to be delivered.

A representative from First Choice will discuss the service agreement and consent documents fully with the participant / the nominated representative during the sign up process.

## First Choice Plan Management's Responsibilities

First Choice Plan Management agrees to provide the following services:

- to verify the Participant's Plan details via the NDIS Portal and provide our services in accordance with the plan details recorded in the Portal;
- use the service descriptions and pricing structures set out in the published NDIS Price Guide and apply them as directed by the NDIS Act and Rules and consumer law;
- support the Participant with budget management and advice to achieve the Participant's goals and outcomes:
- only pay for a particular service or support up to the maximum price as per the NDIS Price Guide;
- claim and pay support and supplier invoices on the Participant's behalf, ensuring full, accurate records are kept as evidence of claims paid;
- manage NDIS claims and disburse funds to providers for delivered supports and services:
- track expenditure of supports and services against your Plan budget;
- provide monthly statements of your expenditure and remaining Participant Plan funds available;
- adopt systems to minimise risks associated with plan spending on supports and services that will exceed a Participant's Plan limit
- adopt systems and processes to minimise the risk of paying for supports and services not funded by the Participant's Plan;
- facilitate Participant's access to real time Plan information using Careview Advantage online program;
- Provide a Contact Centre – by phone or email to support and answer questions relating to your plan.

## First Choice Plan Management's Commitment to a Positive Plan Management Experience

We seek to provide a positive Plan Management experience and commit to the following:

- comply with the NDIS Code of Conduct and Practice Standards;
- protect your privacy and confidential information (a copy of our Privacy Policy is provided with this agreement);
- use a Participant's preferred language and method of communication when establishing the service agreement to ensure the Participant has a clear understanding of the agreement;
- communicate openly and honestly with the Participant. We understand your queries regarding your plan and funding are a highly priority and we commit to responding to your queries in a timely manner;
- treat you and / or your nominated representative with courtesy and respect;
- deliver our services with integrity, honesty and in a transparent manner;
- support the Participant to exercise choice and the ability to explore opportunities for informed decision making in the pursuit of the Participant's goals and outcomes;
- provide you with information about managing any complaints or disagreements. We acknowledge and respect your right to make a complaint about any supports provided and we commit to providing a 'positive complaints culture' and resolution process;
- ensure your independence and right to choice and have in place policies and procedures to actively manage any conflicts of interest;

## Participant and / or Nominated Representative Responsibilities

- inform us immediately if your Plan is suspended or replaced by a new Plan or you stop being a participant of the NDIS;
- before engaging a provider or receiving any supports under your Plan, verify with First Choice the availability of funds in your NDIS budget;
- communicate with First Choice on how you wish supports to be delivered;
- only purchase supports that the NDIA define as 'reasonable and necessary';
- advise the general nature of your disability so that First Choice can adhere to the NDIS criteria of 'reasonable and necessary';
- if required for regulatory or auditing purposes, be contacted by third parties to discuss our services and have your records reviewed;
- receive documents and information from First Choice electronically (information can also be posted by mail if requested);
- agree to First Choice disclosing your personal information to third parties only for the purpose of the implementation of your Plan and at all times in accordance with your right to privacy;
- treat First Choice and all our staff with courtesy and respect.



## Fees for Services

From the Start Date of this Agreement, First Choice will automatically invoice the NDIA for the Plan Management services provided under this agreement.

Should the NDIA amend any rates associated with Plan Management services, **First Choice will automatically update its fees in accordance with the NDIS price guide.**

## Current Schedule of Fees for Services –

**These fees are paid by the NDIS (not the participant)**

**(Current at the time of signing the Service Agreement)**

<p><b>Plan Management establishment fee</b> (Improved Life Choices on your NDIS Plan) To cover the initial cost for the establishment of financial arrangements between the Participant and First Choice Plan Management – including an initial meeting (face-to-face, telephone or other online meeting).</p>	<p>\$232.35 once-only establishment fee</p>
<p><b>Monthly processing fee</b> (Improved Life choices on your NDIS Plan) For ongoing financial plan management, payment of invoices and monitoring of the Participant's Plan budget.</p>	<p>\$104.45 per month</p>

## Goods and Services Tax

For the purposes of the GST Act (A New Tax System (Goods and Services Tax) Act 1999 (Cth)), the parties confirm that:

- a supply of supports under this 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 your Plan currently in effect under Section 37 of the NDIS Act;
- your Plan is expected to remain in effect during the period the supports are provided; and
- you will immediately notify us if your Plan is replaced by a new Plan or you stop being a participant in the NDIS.

On this basis, the services provided by First Choice Plan Management under this Service Agreement shall be deemed to be GST-free.



## **Service Agreement Changes**

If any material amendments to this Service Agreement are required, First Choice Plan Management will notify you in writing (by email) of the changes and the date they take effect.

These amendments shall be considered to be accepted by you unless you notify us in writing within 7 calendar days.

## **Start Date of This Service Agreement**

**As per the online / website sign up date**

## **End Date of This Service Agreement**

This service agreement will remain in operation for the duration of time that First Choice Plan Management provides plan management services, this includes after an NDIA plan review or plan renewal.

Should either party wish to terminate the service agreement then 30-day's notice in writing is required.

In the event of a serious breach of the Service Agreement by either party, then this notice period is waived.



## Feedback, Complaints and Disputes

First Choice Plan Management adopts a policy of open communication with Participants and has a fully documented process for Participants to lodge feedback and / or a complaint.

If a Participant or Nominated Representative wishes to provide feedback and / or a complaint, or is not satisfied with the provision of support provided and wishes to make a complaint please make contact as below:

**Phone:**           **08 8490 8719**

**Email:**           **[info@firstchoiceplan.com.au](mailto:info@firstchoiceplan.com.au)**

A complaint can also be made directly to the [NDIS Commission](#). This can be done by:

- phoning the Commission on 1800 035 544 (free call from landlines)
- completing the NDIS Complaint Contact Form to let the NDIS know how to best contact you

First Choice Plan Management acknowledges and respects your right to make a complaint about any supports provided and we are committed to open communication with Participants and providing a 'positive complaints culture' and resolution process.

---

I acknowledge I have had an initial discussion with First Choice Plan Management to discuss this Service Agreement and have read, understood and accept the terms and conditions of the Service Agreement.

This Service Agreement is the version located on First Choice Plan Management's website and the participant acknowledge's they have read the Agreement in full and have used the online Sign Up process and have signed the online signature panel.

first  
choice

PLAN MANAGEMENT

first choice

PLAN MANAGEMENT

## Participant Consent to Obtain & Release Personal Information Online / Website Sign Up Version

First Choice Allied Health Services Pty Ltd  
t/as First Choice Plan Management

First Choice Allied Health Services Pty Ltd  
Office: 08 8490 8719  
217/219 Flinders Street, Adelaide SA 5000  
PO Box 248, Hove SA 5048  
E: [info@firstchoiceplan.com.au](mailto:info@firstchoiceplan.com.au)  
ABN 55 644 623 576  
[www.firstchoicealliedhealth.com.au](http://www.firstchoicealliedhealth.com.au)

## Participant Consent to Obtain & Release Personal Information

First Choice Allied Health Pty Ltd (ABN 55 644 623 576) trading as First Choice Plan Management (First Choice) Registered NDIS provider number is 4050081112.

This consent form is to be read in conjunction with First Choice's [Decision Making & Consent Policy](#).

In our role as your plan manager and providing supports and services we need to collect personal information from you to ensure our supports and services meet your needs. If you do not provide this information, we may be unable to fully provide these supports and services.

This information will be used for:

- administrative purposes for running our agency
- billing you directly, through the NDIS, or other agency if required
- use within our service to ensure you are provided with quality supports and services
- disclosure of information to the NDIA, the NDIS Quality & Safeguards Commission, or other government agencies as required
- disclosure of information to health professionals to ensure high quality health care for you
- disclosure to other providers, with your consent, in order to provide appropriate services

First Choice has a [Privacy & Confidentiality Policy](#) that will be provided to the participant and made available on request. The policy provides guidelines on the collection, use, disclosure and security of your information.

To ensure the provision of quality supports and services, information about you may be given to other service providers who also provide you services.

The NDIS Participant,

- has read the above information and understand the reasons for the collection of my personal information and the ways in which information may be used and disclosed and I agree to that use and disclosure
- understand that this consent is valid until consent is removed in writing
- understand that it is my choice as to what information I provide and that withholding or falsifying information might act against the best interests of the supports and services I receive
- am aware that I can access my personal information and notes on request and if necessary, correction any information I believe to be inaccurate
- understand that if, in exceptional circumstances, access is denied for legitimate reasons, that the reasons for this and possible remedies will be made available to me
- have been advised First Choice Plan Management has a Privacy & Confidentiality Policy (to be made available on request)
- have been advised First Choice Plan Management has a Decision Making & Consent Policy (to be made available on request)
- understand that the following supports and services are recommended and relevant information about me may be forwarded to the providers of these supports



I, the participant, understand that the following supports and services are recommended and relevant information about me may be forwarded to the provider(s) listed below, in order that I receive the best possible service.

Support Type	Name of Provider	Type of Information
Government agency	NDIS	All information
Therapists	To be advised	As required
LAC	To be advised	All information
Support coordinator and / or psycho social recovery coach	To be advised	As required
AT/Consumable provider	To be advised	As required
Daily Life / Social / Community supports	To be advised	As required
Auditor for NDIS auditing purposes	Auditor as appointed by First Choice Plan Management for registration purposes	As required

- **this consent is a perpetual, ongoing consent that can be withdrawn / amended by the participant at any time**

I acknowledge I have had an initial discussion with First Choice Plan Management to discuss this Consent and have read, understood and accept the terms and conditions of the Consent.

This Consent is the version located on First Choice Plan Management's website and the participant acknowledge's they have read the Consent in full and have used the online Sign Up process and have signed the online signature panel.