

BUDGET NET

PLAN MANAGEMENT

SERVICE AGREEMENT

To register for plan management with BudgetNet, please complete the below agreement. All details and signatures can be completed [electronically](#) without the need to print and scan copies. Contact us on 1300 402 568 if you have any questions.

NDIS PARTICIPANT DETAILS

First Name: Last Name:
Phone: Mobile:
Email:
Date of Birth: NDIS Number:
Home Address:
Suburb: State: Postal Code:

TRUSTED PERSON, if applicable (or Plan Nominee)

First Name: Last Name:
Contact Number: Relationship to participant:
Email:

SUPPORT COORDINATOR

Do you agree for us to discuss any payments and information with your support coordinator? If yes, please provide their details below:

Company:
First Name: Last Name:
Contact Number: Email Address:

This Service Agreement is made between the above participant and/or their nominee and BudgetNet Pty Ltd. for the purpose of providing supports under the Participant's National Disability Insurance Scheme (NDIS) plan.

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.
- 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

Service	Code	UOM	Amount
Financial Intermediary set up costs	14_033_0127_8_3	Each plan set up	\$232.35
Financial Intermediary Monthly Processing	14_034_0127_8_3	Monthly	\$104.45

We will setup your account with us and the NDIS, then manage any provider payments that are funded through your NDIS funds. We charge in line with the NDIS so there are no out of pocket costs. The fees above are in line with the 2020/2021 price guide, we still accept plans with 2019/2020 amounts.

HOW WE WORK

Our role is to process any invoices from providers. We aim to provide an easy transparent payment process. Any invoices received directly from your email address or phone number will be placed into the queue for payment. We also offer the ability to pay providers on receipt of invoices when they are listed as an approved provider for you. You can add to this list at any time. It is important when you authorise a provider that you are still checking the invoice on the monthly statement or via our app.

YOUR RESPONSIBILITIES

- Providing any invoices that are required to be paid to us via email to ndis@budgetnet.com.au
- Notifying us of any issues with payments and invoices.
- Notifying us of any changes to your NDIS plan.
- Notifying us if you no longer wish for us to manage your plan payments.
- Treat us with respect.
- Only submit claims that are in line with the NDIS guidelines.

OUR RESPONSIBILITIES

- Providing the services listed above.
- Being open and honest about the work completed and the payments made.
- Explaining things clearly.
- Treating you politely and with respect.
- Making sure your information is correct and up to date.
- Storing your information carefully and making sure it is kept private.

Our service is funded by provisions in your current plan and we claim for these directly through the NDIS portal after the issuing of an invoice.

We will make all payments to providers through EFT or BPAY.

CHANGING THE AGREEMENTS

Changes to this agreement must be approved by BudgetNet and the participant or participants representative. Once agreed, updates will be confirmed in writing for both parties.

COOLING OFF PERIOD

If within 14 days of signing our service agreement you change your mind about joining us, we can refund any of our fees paid and close your account.

INDEXATION OF FEES

Our fees are indexed in line with the NDIS price guide which occurs annually. This will not affect funds available for other supports.

ENDING THE AGREEMENT

To end the agreement, you need to provide us 28 days' notice, we will contact you and agree on a date to terminate the agreement and cease services.

PRIVACY POLICY

By signing this agreement, you acknowledge that you have read and understood and agree with our privacy policy which can be accessed at www.budgetnet.com.au/privacy.

SUBMITTING CLAIMS

While our role is to process your NDIS payments, ultimately it is the responsibility of the participant to ensure they are within the guidelines of the NDIS. You agree to only submit claims that adhere to NDIS guidelines with the understanding that we are available to guide you.

FEEDBACK AND PROBLEMS

If you are unhappy about any part of our service or think we can improve, please don't hesitate to contact Michael Coyne directly on 03 8899 6258 or via email michael@budgetnet.com.au

If you're unhappy with the response you can escalate the complaint directly to the NDIS Quality and Safeguard Commission by calling 1800 035 544 or via their website:

www.ndiscommission.gov.au/participants/complaints

CONSENT TO SHARE

We collect information about you for the primary purpose of providing quality supports and services to you. We need to collect some personal information from you to ensure our services meet your needs. If you do not provide this information, we may be unable to fully provide these services. This information will also be used for:

1. administrative purposes for running our service
2. billing you directly, through the NDIS, or another agency if required
3. use within our service to ensure you are provided with quality supports and services
4. disclosure of information to the NDIA, the NDIS Quality and Safeguards Commission, or other government agencies if needed
5. disclosure of information to health professionals to ensure high quality health care for you if needed
6. disclosure to other providers in order to provide appropriate services

We have a privacy policy that is available on request. That policy provides guidelines on the collection, use, disclosure, and security of your information. To ensure the process of quality supports and services, information about you may be given to other service providers who also provide you services.

ADVOCACY

You have the right to use and access an advocate on your behalf. To find an advocate use this link <https://disabilityadvocacyfinder.dss.gov.au/disability/ndap>.

APPROVED REFUND DETAILS

We can provide a refund for purchases made on the behalf of the participant that are approved by the NDIS. Please provide your bank account details for refunds:

Account Name:

BSB:

Account Number:

BUDGETNET PAYMENT DETAILS

Any invoice/receipt received from your email address will be submitted into the queue for payment. If you would like to place automatic approval of invoices, please add the provider to the trusted provider list below. You can add to this list at any time via email. Our system automatically filter's out any duplicate invoices numbers. If approvals or the invoices are received more than once it will not trigger duplicate payments.

TRUSTED PROVIDER ACKNOWLEDGEMENT

By listing a company below you agree for us to make payment when we receive invoices directly from the provider. Invoices received directly will be placed straight into the queue for payment. Any billing issues will need to be raised directly with the provider after payment. You can revoke this at any time via email.

TRUSTED PROVIDER LIST

- 1.
- 2.
- 3.
- 4.
- 5.

PLAN MANAGEMENT CONTINUITY

This feature allows us to setup a new plan without signing a new service agreement. This allows us to continue smooth payments between plans reducing the time for payments to providers. By default, this option is enabled to ensure fast efficient payments, so your services are not impacted between plans. Each new plan is also subject to the 14-day cooling off period. If within 14 days of a new plan you wish to change plan managers, we will refund our fees charged to your plan and agree on a closing date.

I would like to opt out of Plan Management Continuity and sign a new service agreement each plan?

Yes - Tick to opt out -

SIGNATURES

By signing this agreement, you agree to the terms set out in this agreement and privacy policy.

Participant or trusted person's name:

Signature:

Date:

Please email a copy of your NDIS Plan or budget breakdown to ndis@budgetnet.com.au, this is needed to set up the account.