

WELCOME TO ASSIST PLAN MANAGERS

Making Life Easier

Our Information Flyer

Our Mission and Values

Our Process

Our Service Agreement

Service Provider Information



ASSIST
PLAN MANAGERS
Making Life Easier

☎ 0452 238 335

✉ info@assistplanmanagers.com.au

🌐 www.assistplanmanagers.com.au

Your Personal Plan Managers

Providing a professional,
friendly service for
participants and their
families

Plan Management offers the
most choice, transparency and
flexibility and will save you
time and stress.

Whether you are a participant
or a service provider, we are
committed to Making Life Easier
for you.

“

Sandy is kind, caring and approachable and eager to help find solutions. I highly recommend Assist's services for navigating your journey through the NDIS.

Participant

Being in a remote community, it can be challenging getting support for my clients. Assist's professionalism, friendliness, communication, response and willingness to help was amazing.

Support Coordinator

Thank you for managing my son's plan so effortlessly, it's been absolutely fantastic.

Participant's mum









It's so nice to have invoices paid so quickly, and my clients that are with you are super happy too.

Service Provider

”



At Assist Plan Managers, we provide:

-  A personal service, going above and beyond
-  A compassionate, friendly service. We get how frustrating things can be
-  Someone who will listen, and ask 'How can we help YOU?'
-  A fast service where providers get paid promptly and issues are resolved quickly
-  Someone who will respond to phone calls and emails quickly and keep you informed
-  Monthly reports and an app, if you want, to track your funding and invoices
-  Help to find a support coordinator
-  An explanation of your plan and how it works

CONTACT US

Sandy: 0427 838 491
sandy@assistplanmanagers.com.au

Kate: 0452 238 335
kate@assistplanmanagers.com.au

Liz: 0427 955 385
liz@assistplanmanagers.com.au



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Our Mission

To make a difference to the Australian community of disabled children and adults and their families within the NDIS.

Our Purpose

At Assist Plan Managers we have one purpose that motivates everything we do - making life easier for you. We do this by managing your plan funding efficiently, and communicating with you and your service providers, to ensure you receive the maximum benefit from your NDIS funding.

Our Core Values

Our values at Assist, are the heart and soul of our service to you. These values are represented in our logo by the blue, orange and green hearts.



DIVERSITY

Disability comes in all shapes and sizes, ages, races, religion and sexuality. It also comes with different needs. Some clients have complex requirements, others are simple. Some clients need lots of support from us and some just want their provider invoices dealt with promptly and don't need much support at all. We are here for all clients.

What this means to us:

- We find out what your needs are and how much support you want
- We give YOU choice and control
- We don't force anything on you
- We listen to YOU
- We are equal opportunity employers



RELATIONSHIPS

We are committed to developing excellent relationships with our clients, our service providers and each other at Assist.

What this means to us:

- We treat others with respect and care
- We are present in our interactions
- Our words and actions are consistent
- We take personal responsibility
- We are positive in the way we think and speak
- We embrace differing perspectives
- We listen and share information rather than tell
- We are open and honest and transparent in our communications



QUALITY

We are focused on providing our clients with the highest quality service and therefore we are continuously improving what we do to exceed expectations.

What this means to us:

- We are organised and efficient
- We are prompt and reliable
- We are problem solvers
- We hold ourselves accountable
- We are creative
- We have high levels of competency
- We find out if we don't know
- We are continuously learning
- We seek feedback and make changes if required
- We embrace innovation and the technology which improves our service for you



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OUR PROCESSES - HOW IT WORKS



HOW TO START

For us to manage your NDIS funding and your invoices, we require:

- Our Client Registration form filled in and signed. You can find it on our website under SIGN UP at www.assistplanmanagers.com.au
- Your NDIS plan uploaded to this form or emailed to us



ONCE YOU ARE ONBOARD

You can have providers send their invoices directly to:

invoices@assistplanmanagers.com.au. Or you can have invoices sent to you first and then forward onto us. If you pay for something, we will require a receipt and then we will reimburse you.



ONCE WE HAVE RECEIVED THE INVOICE

We will process the invoice with our plan management software according to the requirements of the NDIS.



SUBMISSION TO NDIS

A request is submitted to the NDIS to have funds released from your plan for payment to providers.



PAYMENT IS MADE

Once the funds are approved and released to Assist, we will pay your providers' invoices or your reimbursement. This whole process takes 3 - 5 days.



TRANSPARENCY

At the end of each month you will receive a statement showing all the invoices paid for the month and your remaining funding. You can also download our app and check your funding and invoice status anytime of day.

IMPORTANT INFORMATION

- If you are unsure if you can purchase something, ask your Client Care Manager at Assist or your Support Coordinator
- Ensure we have your latest plan at all times, otherwise we will not be able to process invoices
- If you have paid for an item, you must provide proof of purchase and let us know that it's a reimbursement
- We can not process payments without an invoice, receipt or quote
- You can use any service provider, they do not need to be registered, however they must have an ABN and not be an immediate family member



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Service Provider Information

Dear Service Provider,

Our team at Assist Plan Managers is managing the NDIS funding of your client. Our role as Plan Managers is to make life easier for participants and families in the NDIS. We do this by handling all quotes, invoices, reimbursements and payments for them.



What does this mean for you?

- ➔ Please send your invoice to invoices@assistplanmanagers.com.au
- ➔ Add your client's email address in the CC field
- ➔ We usually pay invoices within 3-5 business days
- ➔ Occasionally payments may take a little longer. In this case we'll endeavour to resolve the issue quickly



Checklist

To help us process payments fast, make sure your invoices include:

- ✓ Your ABN number
- ✓ Your bank details
- ✓ Your client's name and NDIS registration number
- ✓ Brief description of the service provided or item number
- ✓ Serviced hours and hourly rate
- ✓ Total amount due

Yours sincerely,
Assist Plan Managers

Any questions? Get in touch on
0422 715 020 or invoices@assistplanmanagers.com.au

Service Agreement for Plan Management Services

Introduction

This agreement is a contract between you and Zettai Pty Ltd T/A Assist Plan Managers (Assist) and represents all terms and conditions, policies, rights and responsibilities associated with being a plan managed client (Client) at Assist. Assist is a registered provider of supports under the National Disability Insurance Scheme (NDIS). Assist is a financial intermediary service that will help you manage your NDIS budget and its outcomes.

Starting and Ending this Agreement

This Service Agreement will operate for the duration of time Assist provides plan management services to you, as the Client. This may include across multiple years, as well as after an NDIS Plan review, Plan renewal or Plan extension.

The Service Agreement will only end where either the Client or Assist provides the other party with 30 days' notice in writing. This must be done either by email, or pre-paid post and sent to the nominated address. In the event of a serious breach of the Service Agreement by either party, the notice period of termination will be waived.

Our Responsibilities

We will:

- Allocate you a personal Client Care Manager who is always available to answer questions
- Process your service provider invoices so that they meet the NDIS guidelines and then claim to the NDIS for the funding to pay them
- Pay your service providers within 3 - 5 days
- Process your reimbursement claims within 3 - 5 days
- Track your expenditure against your NDIS Plan budget
- Reconcile your NDIS Plan balances
- Connect you to an Careview Advantage app if you wish to check your funding in real time and approve invoices
- Provide you with monthly statements of invoices paid and expenditure
- Assist you with purchases where appropriate
- Manage your provider's service agreement funding
- Troubleshoot with your service providers in relation to any issues with invoices
- Check in with you regularly to see if you need any support
- Work closely with your support coordinator if you have one to help facilitate your plan goals
- Communicate openly and honestly in a timely manner
- Protect and maintain your privacy in accordance with our Privacy Policy
- Treat you, your family and friends and any nominated representatives with courtesy and respect
- Seek regular feedback in relation to your experience with us
- Reserve the right to raise any concerning conduct or behaviour with you or your representative and seek a satisfactory solution

Your Responsibilities

As a plan managed Client or authorised representative, you:

- Declare that you are eligible, have the right, authority and capacity to enter into this agreement
- Will provide accurate and relevant personal details necessary for the delivery of the Assist plan management service (including your NDIS Plan details, date of birth and NDIS number)
- Advise Assist immediately if your NDIS Plan is suspended or replaced by a new NDIS Plan, or if you stop being a participant in the NDIS.
- Will provide all information necessary to ensure your needs are understood, so the most effective service can be provided to you.
- Are responsible for any activity that occurs through your My Place account.
- Will not be discriminating, unlawful, rude, defamatory, harmful, threatening, indecent, harassing, abusive, aggressive, intimidating or offensive.
- Will not participate in, encourage or advocate an illegal activity or violate any law, statute or regulation in your dealings with Assist
- Must not attempt to restrict another user from using Assist' plan management services
- Must not encourage or facilitate violations of these Terms or any other Assist terms or policies.
- Will not publicly act in any way to harm the reputation of Assist or any associated or interested parties.

Assist Fees for Services

Assist will claim directly from the NDIA a setup fee, a monthly administration fee and a training fee if applicable, for the provision of support as agreed in Schedule of Supports - Improved Life Choices (Support Category 14) and at the price as defined at the time of service. Should the NDIA amend any rates associated with our services, Assist will automatically update its fees in accordance with the NDIS Price Guide. No action will be required by you.

For the purposes of the GST Act, 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 NDIS Act. in your NDIS Plan currently in effect under section 37 of the NDIS Act. On this basis, the services provided by Assist under this Service Agreement shall be deemed to be GST free.

GST may be payable on Other Support Services provided to the Customer by a service provider even if that provider is not a registered service provider with the NDIA. If so, the GST payable will be funded by the Customer's Plan.

Service Agreement Changes

If any amendments to this Service Agreement are required, shall notify you in writing of the changes and these shall be considered accepted by you, unless you otherwise notify us in writing, within 7 calendar days.

Feedback, Complaints and Disputes

To provide feedback or make a complaint, you may contact us via the following methods:

Call: **0427 955 385**

Email: **liz@assistplanmanagers.com.au**

We will investigate the complaint and provide you with an email response as soon as we can and normally within 7 days of you contacting us.

In the event that a complaint is not resolved to your satisfaction you may contact the NDIA on 1800 800 110 or visit one of their offices. Further information is also available at **www.ndis.gov.au**.

Participant Consent

Assist Plan Managers collects your information for the primary purpose of providing quality supports and services to you, including some personal information to ensure our services meet your individual needs.

Assist Plan Managers may disclose your information to other service providers or health professionals only with your consent.

Disclaimer

- Any advice provided by Assist outside of the scope of services set out in this Service Agreement shall be considered general in nature.
- Assist shall not be liable for any failure of, or delay in the performance of this Service Agreement for the period that such failure or delay is: beyond the reasonable control of a party; materially affects Assist's performance of any of its obligations under this Service Agreement; and could not reasonably have been foreseen or provided for (such as government acts prohibiting or impeding any party from performing its respective obligations under the Service Agreement).
- Nothing in the Assist Plan Managers service agreement negates or diminishes the statutory guarantees regarding the supply of services the Participant/nominated representative receives under Australian Consumer Law (Competition and Consumer Act 2010 - Schedule 2)
- Assist Plan Managers takes in good faith the information provided by the Participant/nominated representative to be true and accurate, and that any claims presented to Assist Plan Managers are a true reflection of goods and services provided to the Participant in line with the NDIS guidelines (National Disability Insurance Scheme Act 2013)

Assist Plan Managers is limited to perform the role set out in our responsibilities. We will always aim to provide an outstanding service. If you require extra assistance with decision making, daily planning, budgeting, understanding your plan, connecting with providers or any non-invoice or purchase related advice, this can be provided where possible at a standard fee.

Client Registration

Getting Started

To get started with Assist Plan Managers, we need two things:

- 1. Your NDIS Plan** - If you have a copy, please email it to sandy@assistplanmanagers.com.au. Otherwise, download it from your MyPlace account on MyGov, or take a photo of it and email it to sandy@assistplanmanagers.com.au
- 2. Fill out our client registration form and sign it.**

NDIS Participant

Name

Date of Birth

Residential Address

PostCode

NDIS Plan

NDIS Number

Is this your First NDIS plan?

YES NO

Plan Start Date

Plan End Date

How did you Find Us?

- LAC or Planner Support Coordinator NDIS Provider Directory My Community Directory Google
 Facebook Instagram Another NDIS participant A friend A service provider (not support coordinator)

Preferred Contact

Is the NDIS Participant the Preferred Contact?

YES NO

Preferred Contact (if the Answer is NO)

Name of Preferred Contact

Relationship to Participant

Email Address

Phone Number

A copy of this form will be sent to the Preferred Contact. You can include another email address here if you like.

Reimbursement Details

If you pay for things upfront, we will need your bank details so we can reimburse you. These details are confidential and never provided to anyone else.

BSB

Account No.

Account Name

Client Registration

Support Coordinator

Do you have a Support Coordinator

YES NO

Support Coordinator (if the Answer is YES)

Name

Phone Number

Support Coordinator Email Address

Name of Company of Support Coordinator (if there is one)

Do you give Consent for your Support Coordinator to view your Plan funding status?

YES NO

Agreement Signature

I have read and understood Assist Plan Manager's Service Agreement

Participant/Representative Signature

Full Name

Today's Date