



Complete Money Management Plan Management

Service Agreement

Please complete the first page of this service agreement and sign at the bottom when you have read and understood the service agreement in its entirety.

1- Parties involved

NDIS Participant Full Name:	{Line 1}
NDIS Number:	{Line 2}
Date of Birth:	{Line 3}
Plan Start Date:	{Line 4}
Plan End Date:	{Line 5}
State or Territory Plan was approved:	{Line 6}
Participants representative's name and relation to participant:	{Line 7}
Do you consent to having your subsequent plans automatically renewed:	{Line 8}
Contact email address:	{Line 9}
Contact phone number:	{Line 10}
Home address:	{Line 11}
Participant (or representative) signature:	{Line 12}



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2 – The NDIS and this Service Agreement

This Service Agreement is between the NDIS participant {Line 1} in the National Disability Insurance Scheme (NDIS) and Complete Money Management Pty Ltd (CMM).

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, social and economic participation of people with a disability
- Enable people with a disability to exercise choice and control in the pursuit of their goals with planning and delivery of their supports.

Schedule of supports CMM agrees to provide the participant start date is in {line 4} and end date is in {Line 5}. Any subsequent NDIS plans will be automatically renewed with CMM if stated on {Line 8}.

By signing this agreement, you are consenting to share information with other agencies (within the privacy act 1988) that may be involved with your service provision for financial administration. It also allows them to share information with us.

3 – Schedule of Support/Fees

CMM will receive funding from the NDIS for financial administration as stated in your plan under **Improved Life Choices (CB Choice & Control)**. This amount typically consists of a financial set up fee, as well as a monthly payment for financial administration. All services delivered to NDIS Participants by CMM is GST free supply (under Section 37 of the NDIS Act 2013)

4 – Responsibilities of the provider

The provider (CMM) agrees to:

- a) Process invoices in a timely manner.
- b) Provide the participant with monthly statements showing which support providers/suppliers have transacted from the participants plan, if requested by the participant (or their representative {Line 7} in writing.
- c) Only pay invoices in line with the NDIS price guide, where a support is priced above the price guide, CMM will only claim and pay the hourly rate advised by the NDIS price guide.
- d) Communicate openly and honestly in a timely manner.
- e) Always treat the participant with courtesy and respect.
- f) Give the participant information about managing any complaints or disagreements and details of the provider's cancellation policy (all mentioned in this document).
- g) Listen to the participants feedback and resolve any problems in a timely manner.
- h) Give the participant the required notice if the provider needs to end the Service Agreement (see 'Ending this agreement' below for more information).
- i) Protect the participants privacy and confidential information in accordance with the Privacy Act 1988.
- j) Provide supports in a manner consistent with all relevant laws, including the National Disability Insurance Scheme Act 2013 and subsequent rules, and the Australian Consumer Law; keep accurate records on the supports provided to the participant.

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- k) CMM does not make the decision if a support or purchase is reasonable and necessary (under section 34 of the NDIS Act 2013)
- l) CMM does not give approval of Assistive Technology/Home Modification Purchases, only pays the invoice once received (where there is allocated funds available)

5 – Responsibilities of the Participant/Representative

The participant {Line 1}/ participant's representative {Line 7} agrees to:

- a) Using the NDIS funds that meets the NDIA Act (section 34) reasonable and necessary (the participant is responsible for any funds spent that the NDIA may deem as not reasonable and necessary).
- b) Where supports were accessed over the funds allocated in the NDIS plan, the participant takes responsibility for any shortfall in the plan. Should you expend your funding prior to completion of your plan, this is not the responsibility of CMM.
- c) If required, request monthly statements in writing (via email or mail).
- d) Treat the provider with courtesy and respect at all times (please note your suppliers need to behave professionally, respectfully and with courtesy as well)
- e) Talk to CMM if the participant has any concerns about the services being provided.
- f) Understand payment timeframes set by individual service providers may not be met by CMM.
- g) Be responsible for keeping track of expenditure through access to MyPlace portal.
- h) Understand that this Service Agreement is only valid if the NDIS Plan is transactable with the plan managed categories.
- i) Where transactional or onboarding issues may occur with your plan and the NDIS, it is important to be aware this may affect payment timeframes to your providers. It is your responsibility to inform your providers of this should transactional issues outside of CMM's control occur – abuse or harassment in these cases towards CMM staff will not be tolerated.
- j) Give the provider the required notice in writing if the participant needs to end the Service Agreement (see 'Ending this Service Agreement' below for more information).
- k) Let the provider know immediately if the participant's NDIS plan is suspended, reviewed or replaced by a new NDIS plan or the participant stops being a participant in the NDIS.
- l) Where required, seek more guidance on the NDIS, either from your support coordinator or Local Area Coordinator (LAC) depending on your NDIS plan.

6 – Payments

CMM will seek payment for their provision of supports as per NDIS guidelines. The participant has nominated the Financial Administration Provider: CMM to manage the funding for NDIS supports provided under this Service Agreement. After providing those supports CMM will claim payment for those supports from the National Disability Insurance Agency.

7 – Changes to this Service Agreement

If changes to the supports or their delivery are required, the parties agree to discuss and review this Service Agreement. The parties agree that any changes to this Service Agreement will be in writing, signed and dated by the parties.



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8 – Ending this Service Agreement

Should either party wish to end this Service Agreement they must give 28 days' notice. CMM reserves the right to end this service agreement immediately should technical issues from the NDIS compromise our services to deliver the plan. If either party breaches this Service Agreement the requirement of notice will be waived.

9 – Feedback, complaints and disputes

If the participant/nominee wishes to give feedback, make a complaint or dispute, the participant/nominee can contact CMM on the contact details provided below. If the participant/nominee 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 www.ndis.gov.au for further information.

10 – Contact details

The provider can be contacted on:

Name:	Brad Holland
Business Name:	Complete Money Management (CMM)
Phone:	0466 229 884
Email:	bradh@completemoney.com.au
Address:	4 Beischer Street, Strathdale, Victoria 3550

11 – Agreement consent

Upon signing this Service Agreement {Line 12} on page 1, I understand the role of CMM as my Financial Administrator. I accept and comprehend the terms set out within this Service Agreement.

Bradley Holland
Managing Director