

Registration Form

Plan Hero Plan Managers

If you need help completing this form, call us on 1300 599 770.

Send your completed form and a copy of your NDIS plan to support@planhero.com.au

Step 1: Participant Details

Full Name

Preferred Name Date of Birth
dd/mm/yyyy

Pronouns She/Her He/Him They/Them

Address

Email Phone

Primary Disability

Telling us your primary disability will assist us in ensuring we can provide you the best support possible, and also provide suggestions for supports available

Do you require an interpreter? Yes No

If yes, what language is spoken at home?

Step 2: NDIS Plan Details

NDIS Number

Plan Start Date Plan End Date
dd/mm/yyyy dd/mm/yyyy

Are you currently Plan Managed? Yes No

If no, how is your plan being managed? NDIA-managed Self managed

Are you currently with another plan manager? Yes No

If yes, who is your current plan manager?

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Step 3: Primary Contact Details

Tick here if same as participant details *If ticked, proceed to Step 4*

Full Name

Pronouns She/Her He/Him They/Them

Email Phone

Relationship to the participant

Authorised representative, carer, parent, guardian

Step 4: Support Coordinator Details

Do you have a support coordinator? Yes No

If no, please proceed to Step 5, if yes, complete Support Coordinator details below

Full Name

Pronouns She/Her He/Him They/Them

Email Phone

Do you want to give your Support Coordinator access to your claims portal?

Yes No

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Step 5: Invoice Approval

Tell us how you would like us to pay your invoices

1) Plan Hero pays my invoices automatically

This means that we will submit each invoice to the NDIA automatically for claiming on your behalf, whether this is sent from yourself or a provider. You can keep up to date with your spend and funding via our portal and we will send you monthly statements so you can see what claims we have paid on your behalf.

2) I want to approve each of my invoices manually

You will receive an email to approve every invoice on our claim portal before we submit it to the NDIA on your behalf. You will have up to 7 days to approve or reject the claim online so we can follow this up on your behalf, after which the claim will be automatically submitted for claiming.

How would you like your invoices approved?

Manually Automatically

Step 6: Sign to agree to services

By signing below, "You" (the participant/participant's representative (if involved) are agreeing to the terms & conditions as outlined in the Plan Hero Plan Managers Service Agreement below

Full Name

Signature

Date

dd/mm/yyyy

Plan Hero Plan Managers Service Agreement

Parties

This Service Agreement ("Agreement") is made between "You" the Participant / Participant's representative listed in Step 1 and 3 (if involved) and (Plan Hero Pty Ltd - ABN 43641197659) "Plan Hero" the Provider.

Start and End Date

The supports will begin on the date on which you sign this agreement (Step 5). The Service Agreement will operate for the duration of time Plan Hero provides plan management or self-management services to you, as the Customer. This may include across multiple years, as well as after an NDIA Plan review or Plan renewal.

The Service Agreement will only end where either the Customer or Plan Hero provides the other party with 28 days' notice in writing. This must be done either by pre-paid post or email, sent to the nominated addresses for notice, set out in the Welcome Letter or such other address as notified to the other party from time to time.

In the event of a serious breach of the Service Agreement by either party, the notice period of termination will be waived.

The NDIS and this Service Agreement

This Service Agreement is made for the purpose of providing support to you under your NDIS plan. You and Plan Hero both agree that this Agreement is consistent with the aims and policies of the NDIS, especially the aim to give Participants more choice about what support they need to achieve their goals and take part in the community.

SUPPORTS PLAN HERO WILL PROVIDE THE PARTICIPANT

Plan Hero agrees to provide you with supports in line with your NDIS plan, as set out in the NDIS price guide. All prices are GST inclusive (if applicable) and include the cost of providing the supports.

We agree to provide general plan management services including:

- Facilitating payments of invoices on your behalf;
- Processing reimbursement claims to you (where approved to do so);
- Tracking expenditure on Provider supports, against your budget;
- Provide Monthly statements that show you how funds are being used and remaining available funding
- Access to our Plan Hero team to assist with questions relating to your Plan and our services

Any additional NDIS-like supports you wish Plan Hero to provide that are not funded in your NDIS plan will be your responsibility to pay.

PLAN HERO'S RESPONSIBILITIES

1. Keep accurate and up-to-date records of all claims processed on your behalf
2. provide you with the supports we have agreed to provide, at the agreed time, and in a manner consistent with all relevant laws, including the National Disability Insurance Scheme Act 2013 and rules, and the Australian Consumer Law;
3. treat you politely and with respect and involve you in all decisions about how supports are provided;
4. ensure our support staff are qualified and skilled in providing the supports you need;
5. Process only those claims for Other Support Services that are consistent with your Plan and with the service agreements you have told us about or with other instructions you have provided;

If you need help completing this form, call us on 1300 599 770.

6. Provide access to information about amounts claimed and your remaining balances for Our Services and Other Support Services;
 7. Make contact with the NDIA about your Plan when necessary; and
 8. listen to your feedback on how well we are doing so we can resolve problems quickly and continually improve the services provided to you;
 9. implement a Standing Approval to automatically approve invoices from Providers on your behalf. If you opt-out of Standing Approval for any of your providers, we will automatically approve invoices on your behalf if you have not approved or rejected them within our payment timeframe.
 10. protect your privacy and make sure your personal information is safe and secure;
- Note: We will clearly explain to you how we do this and will ask you for your consent to share your information (there may be times we are legally required to do this)

CUSTOMER RESPONSIBILITIES

When you sign this Service Agreement, it means that you agree to do the following things:

1. let Plan Hero know about the supports you need and how you want to receive them;
2. provide Plan Hero with a copy of your NDIS plan so we can understand your goals and support needs and make plans to provide those supports and utilise funding appropriately;
3. tell us immediately if your NDIS plan changes or if you stop using the NDIS;
4. be polite and respectful to Plan Hero staff;
5. talk to us if you are unhappy with any part of our support services, or our support staff, as soon as you can;
6. tell us if you change your contact details, like your phone number or address, as soon as possible;
7. pay Plan Hero invoices within 14 days if you are self-managing funding for supports, and
8. give us 28 days' notice if you no longer want Plan Hero to provide you with support, or if you wish to change or end our Service Agreement.

PAYMENTS

Plan Hero will seek payment for the plan management services we have provided to you directly from the NDIS, as of the start date.

Should the NDIA amend any rates associated with Plan Hero's services, Plan Hero will automatically update its fees in accordance with the NDIS Price Guide.

No action will be required by you.

CHANGES TO THIS SERVICE AGREEMENT

If significant changes to the supports we provide are required, the parties agree to discuss the changes and review the Schedule of Supports and if necessary, amend this Service Agreement. However, if changes are made to the Schedule of Supports that have an impact on the budget or service delivery arrangements, a change to this Service Agreement may be required. The parties agree that any changes to this Service Agreement will be in writing, signed, and dated by the parties.

ENDING THIS SERVICE AGREEMENT

Should either party wish to end this Service Agreement they must give the other party one month's (or 28 days) notice.

Plan Hero reserves the right to terminate or withdraw supports under the following conditions:

- a. Plan Hero has determined that a Participant or Provider has engaged in fraudulent misconduct
- b. You have not paid the Service Payment and do not pay these amounts within 60 days of receiving an overdue notice;
- c. You cease to be a Participant in the NDIS;
- d. If we are unable to continue to support you without serious risk of harm to yourself, other people or staff or a breach of our workplace health and safety obligations.

AUDITS UNDER THE NDIS COMMISSION

As part of the requirements of the NDIS Practice Standards and continued registration, we must undertake an external audit periodically. As part of this audit, your views on our services are valued and important. Unless you opt-out, you will automatically be included in the audit process for Plan Hero.

FEEDBACK, COMPLAINTS & DISPUTES

Plan Hero encourages you to give us feedback on any aspect of the support we provide. We would like you to let us know if you are happy with our support or unhappy.

If you wish to give us feedback or make a complaint, you can contact the Customer Service Officer by email, telephone, writing a letter or making a time to meet in person.

Telephone: 1300 699 770 Email: info@planhero.com.au

If you are not satisfied with our response you can request a meeting to discuss the matter further with the Director or their delegate on the details above.

If you are still not satisfied with the outcome of this process, you can contact the National Disability Insurance Agency by phone or visit their website for further information.

Telephone: 1800 800 110 Website: www.ndis.gov.au

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 your NDIS plan currently in effect under section 37 of the NDIS Act;
- Your NDIS plan is expected to remain in effect during the period the supports are provided, and
- You or your representative will immediately notify Plan Hero if your NDIS plan is replaced by a new plan or you stop being a participant in the NDIS.

CLIENT CONSENT

Provider Declaration

Disclosure of your personal information to Plan Hero places Plan Hero in a position of trust and as such we seek to protect and uphold the privacy of individuals in accordance with the APPs.

Generally, we only use or disclose personal information about you for the purposes for which it was collected (as set out above). We may disclose personal information about you to:

- our related entities and other organisations with whom we have affiliations so that those organisations may provide you with information about services and various promotions;
- other Plan Hero users where you both expressly consent to this disclosure and to connect with one another; and
- to third parties as otherwise permitted or required by law.
- Software used to assist with Plan management and Self-management services, including, but not limited to, Credability Systems.

In all other situations, we will only disclose your personal information with your consent or where relevant, the consent of a person that can provide consent on your behalf under the Privacy Act. Notwithstanding the above, as a Plan Hero client you have the right to withdraw consent to disclose your personal information at any time by contacting us at the details below.

Plan Hero will work closely with other agencies to coordinate the best support for you. We need your consent to share your information, except when:

- we are obliged by law to disclose your information regardless of consent or otherwise
- it is unreasonable or impracticable to gain consent or consent has been refused; and
- the disclosure is reasonably necessary to prevent or lessen a serious threat to the life, health or safety of a person or group of people.

Client Declaration

I acknowledge that Plan Hero has advised me of the following:

- Plan Hero's Privacy and Confidentiality Policy and Procedure;
- my right to access my personal information; and
- my right to withdraw my consent at any time.

Client Consent

I give consent for Plan Hero to:

- collect the information, including audio and visual records, needed to provide me services;
- store information about me;
- allow staff, who need my information to provide services to me, access to information about me;
- share my information except with the people and/or organisations listed below.

Parties Excluded from Information Sharing

Please email us directly at support@planhero.com.au the parties you wish to exclude from information sharing

Next Steps

1. Send this completed form PLUS a **copy of your NDIS plan** to support@planhero.com.au
2. Once received we will be in touch with you within 2-3 business days to confirm your registration