



Service Agreement for Provision of Financial Intermediary Services

Parties

This Service Agreement is between OnTime Plan Services and the below Participant or their nominated representative in the National Disability Insurance Scheme (NDIS). This Service Agreement will be in effect from today for the duration of the Participant's association with OnTime Plan Services, or until notified otherwise in writing by either party.

In this document, the words "we" or "our" refer to OnTime Plan Services. The words "you" or "your" refer to the NDIS participant, or their nominated / chosen representative. This includes guardians, NDIS accepted nominees, or parents.

NDIS Participant's Details:

Name:	
Preferred name / pronouns:	
NDIS Number:	
Date of Birth:	
Address:	
Email:	
Phone:	

Representative's Details (where applicable):

Name:	
Address:	
Email:	
Phone:	

OnTime Plan Services Contact Details

1A Scott Cres, Eaglehawk VIC 3550

Phone: 03 5446 5400

Text: 0429 800 482

Email: hello@ontimeplanservices.com.au

The NDIS and this Service Agreement

This Service Agreement is made for the purpose of providing supports under your NDIS plan. We agree to provide you with financial intermediary services. The supports and their prices are set out in the below Schedule of Supports.

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 a disability, and
- 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

We agree to provide you with financial intermediary services. Pricing for this support is based on the NDIS Pricing Arrangements and Price Limits, and subject to change in accordance with NDIS reviews. We will charge the current maximum rates as set by the NDIS. You agree that the price for services can be changed in line with NDIS guidelines, without any further prior agreement.

As at 1st July 2025, the rates are:

Monthly Fee \$104.45

Set Up Costs \$232.35 (where applicable for services prior to 30 June 2025)

Goods and services tax (GST)

GST does not need to be charged on services, if these meet the Australian Taxation Office criteria.

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 the participant's NDIS plan currently in effect under section 37 of the NDIS Act;

- The participant's NDIS plan is expected to remain in effect during the period the supports are provided.

Under subsection 33(2) of the National Disability Insurance Scheme Act 2013 (NDIS Act), Plan Management services are a reasonable and necessary support when funded in a participant's NDIS plan currently in effect under section 37 of the NDIS Act. GST will therefore not be charged on Plan Management fees.

Responsibilities of Provider

Where provisions have been made in your plan, we agree to provide financial intermediary services including:

- Paying supplier invoices on your behalf.
- Advising you and your provider if we're unable to pay an invoice.
- Processing your reimbursement claims.
- Tracking your expenditure against your NDIS budget.
- Reconciling your NDIS balances and providing monthly statements of expenditure and available funding upon request.
- Keeping records as stipulated by the NDIS, in case of future audits.
- Liaise with you via your preferred method (if practical) whenever required.
- Communicate openly and honestly in a timely manner.
- Treat you with courtesy and respect.
- Listen to your feedback and resolve problems quickly.
- Give you information about managing any complaints or disagreements.
- Protect your privacy and confidential information as per our Privacy Policy.

Responsibilities of the Participant / their Representative

You agree to:

- Provide information as requested by us in a timely manner.
- Treat our staff with courtesy and respect.
- Discuss any concerns about our services with us at the earliest opportunity.
- Advise us immediately if your NDIS plan is suspended or replaced by a new NDIS plan, or you stop being a participant in the NDIS.
- Give us the required notice if you need to end the service agreement (see 'Ending this Service Agreement' below for more information).
- Provide us with a copy of your NDIS plan where possible.

Payments

As your plan manager, we will be claim our agreed fee/s directly from the NDIS. You will be able to see this in your monthly statement. This will come from your Choice and Control budget (Improved Life Choices in older plans).

After NDIS supports have been provided to you, you or your service providers can request payment or reimbursement for those supports. We will claim these from the NDIA on your behalf. Once the NDIA has paid the claim to us, we will pay you or your providers. Itemized invoices or receipts should be sent to: accounts@ontimeplanservices.com.au.

When an invoice requires approval before payment, we will give you notice via an email, text message or our phone app, requesting approval or decline. If no answer is received within 3 business days, the invoice will automatically be approved and paid.

How would you like your invoices to be approved?

- ☐ Email
- ☐ Text message
- ☐ Phone App
- ☐ Some invoices automatically approved – please provide details
- ☐ All invoices automatically approved

Further information around our procedures for processing invoices, and what is required on an invoice before we can claim it, is on our website.

Claims and Liability

When you request someone else to provide you with a service, we are not a party to that transaction. Only you can ensure that the service meets your needs, and that the provider is charging correctly for the services they have provided.

As an intermediary, we can only lodge a claim with the NDIS for supports that are:

- reasonable and necessary for you (as decided by the NDIS).
- in accordance with your funded supports.
- in compliance with NDIS legislation, guidelines and requirements.
- in line with your goals, objectives and aspirations.
- not more appropriately funded or provided through other service systems.

It is important to note that:

- ! If you have requested a service that does not meet the above criteria, we cannot claim it.
- ! The NDIS has the final decision and can choose not to pay a claim.
- ! The NDIS can decide at any time to reclaim funds for invoices they have already paid.
- ! **In all of these situations, you are then liable to pay for that service through other means. This may mean you need to repay money to us, if the NDIS reclaims funds.**

You have the right to dispute any invoices that a provider submits for payment. We can advise the provider that you disagree with the invoice as it has been submitted. It is then up to you and the provider to come to an agreement.

If you have asked us not to claim an invoice from your NDIS plan, we cannot claim it. **You are then liable to pay for that service through other means.**

Ending this Service Agreement

Should either party wish to end this service agreement they must give 1 week's notice. If either party seriously breaches this service agreement the requirement of notice will be waived. Providing us with notice helps us to ensure that outstanding invoices are paid to your providers.

Feedback, complaints and disputes

If you wish to give us feedback, or are not happy with the provision of our supports and wish to make a complaint, you can:

- speak with Mr. Rod McNeill on 03 5446 5400 or text 0429 800 482;
- email hello@ontimeplanservices.com.au; or
- mail to PO Box 1202, BENDIGO, VIC 3552.

If you are not satisfied or do not want to talk to us directly, you can contact the NDIS Commission:

- by calling 1800 035 544; or
- consulting <https://www.ndiscommission.gov.au/complaints/make-complaint-about-provider-or-worker> for further information.

Agreement signatures

The Parties agree to the terms and conditions of this Service Agreement.

Participant / Representative Signature:

Signed:	
Name:	
Date:	

Signed by OnTime Plan Services:



Rod McNeill

Director, OnTime Plan Services