



Service Agreement – NDIS Plan Management

Financial administration of a NDIS plan between JP Plan Management Pty Ltd (NDIS Registered Provider 4050123867) and the Participant and/or their Nominee named in the Sign-Up section of this agreement.

By signing this agreement and submitting the JP Plan Management Web Sign-Up Form, you confirm that you have read, understood and agree to the terms below. Please download and keep a copy for your records. If you would like this agreement explained, provided in another format or language, or read with a support person or advocate, please contact us before signing.

1. About this agreement

This agreement sets out how JP Plan Management Pty Ltd ("JP Plan Management", "we", "us") will manage the funding in your NDIS plan, and what you ("you", meaning the Participant or their Nominee / authorised representative) agree to do.

It is made in line with the **National Disability Insurance Scheme Act 2013** (NDIS Act) as amended, including by the National Disability Insurance Scheme Amendment (Getting the NDIS Back on Track No. 1) Act 2024 and the National Disability Insurance Scheme Amendment (Securing the NDIS for Future Generations) Act 2026, the NDIS Rules (including the NDIS support lists), the NDIS Pricing Schedule and price limits, the NDIS Code of Conduct, the NDIS Practice Standards, the **Privacy Act 1988** (Cth) and the Australian Consumer Law. Where the law or NDIA requirements change, the law applies and we will update this agreement.

1.1 Start date. This agreement starts on the date you sign and submit the Web Sign-Up Form.

1.2 Duration. It continues for as long as you use our service, including across new or reassessed NDIS plans where plan management is funded, until it is ended under section 12.

1.3 Getting started. Once you accept this agreement, you (or your nominee) will give us your NDIS number, a copy of your current NDIS plan (including budgets and funding periods) and endorse JP Plan Management as your plan manager with the NDIA (through the My NDIS app/portal, your NDIS contact or by calling 1800 800 110).

1.4 Key terms.

Term	What it means in this agreement
NDIS supports	Supports that are allowed to be paid for with NDIS funding under section 10 of the NDIS Act and the NDIS support lists. Some items can only be bought as an approved "replacement support".
Funding period	The part of a plan budget that the NDIA releases for a set time (for example monthly, every 3 months or 12 months) under section 33 of the NDIS Act. Funds can only be spent once they are released.
Price limits	The maximum prices providers may charge plan-managed participants, as set in the NDIS Pricing Schedule / pricing determinations in force at the time.
Participant Portal	The secure online participant portal (and app, where available) provided through our plan management program, where you can view budgets, balances, invoices and statements and approve invoices.

2. Schedule of supports and fees

JP Plan Management agrees to provide plan management (financial administration) of your NDIS plan as described in this agreement.

Support	NDIS support item	Price	Funded from
Plan management – monthly financial administration	Monthly Fee 14_034_0127_8_3	NDIS price limit at the time of service	Capacity Building – Improved Life Choices

- Our fees are claimed directly from the NDIA from the plan management funding in your plan. **You do not pay our fees, and they do not reduce your Core or other Capacity Building budgets.**
- If the NDIA changes the price limits for plan management, our fees will change automatically to match. We do not charge any other fees.
- Supports or costs that are not NDIS supports, or that are not covered by your plan, are your own responsibility and are not part of this agreement.

3. Our responsibilities (JP Plan Management)

We will:

- Provide financial administration of your NDIS plan, including processing claims and payments in line with the NDIS Act, NDIS Rules, the NDIS Pricing Schedule and NDIA plan management guidelines.
- Check each invoice before payment (see section 6.3), including that it appears to be an NDIS support, is within price limits, is for a date within your plan and is covered by available funds in the correct budget and funding period.
- Pay providers and process your reimbursement claims promptly, and within 2 business days of receiving payment from the NDIA.
- Submit claims to the NDIA as soon as practicable after receiving a complete invoice, and within the NDIA claiming timeframes (see section 8).
- **Provide you with a monthly statement** of your plan spending and balances (see section 5).
- **Give you access to our Participant Portal** so you can monitor your funding, budgets and balances and approve invoices at any time (see section 5).
- Tell you early if your spending is tracking ahead of your funding period or plan budget, or if an invoice cannot be paid.
- Explain how your plan budgets and funding periods work and give you information to support your choices. Decisions about which supports to buy and from whom remain yours.
- Act independently and in your interests, declare and manage any conflict of interest, and never pressure you to use a particular provider.
- Comply with the NDIS Code of Conduct and the NDIS Practice Standards, and communicate openly, honestly, respectfully and in a timely way.
- Listen to your feedback, resolve problems as quickly as possible and give you our feedback and complaints information (also available at www.jpmm.com.au).
- Protect your privacy and confidential information in line with the Privacy Act 1988 and our privacy policy.
- Provide information to the NDIA and the NDIS Quality and Safeguards Commission when required by law and keep records for at least 7 years as required for NDIS providers.
- Help you move to a new plan manager or management type if you choose, including forwarding unpaid invoices we hold.

4. Your responsibilities (Participant / Nominee)

I agree to:

- Only buy **NDIS supports** that are consistent with my NDIS plan (including any stated supports and conditions) and that relate to my disability support needs.
- Check that I have enough funds in the correct budget **and in the current funding period** before I agree to receive a support or sign a service agreement with a provider.
- Only agree to service bookings and schedules with providers that can be paid from my plan funding, and review them if my plan or funding period amounts change.
- Ask providers to send invoices to JP Plan Management promptly – ideally within 7 days of the support – and forward any invoices or receipts I receive directly to us straight away.
- Check and approve invoices within 24 hours of a notification, using my chosen approval method in the Sign-Up section, and tell us immediately if an invoice is wrong or a support was not delivered.
- Check my monthly statements and the Participant Portal regularly and tell us if anything looks incorrect.
- Tell JP Plan Management immediately about any plan reassessment, new plan, plan variation, change to funding periods, suspension, change of nominee, or if my plan ends.
- Provide current bank details for reimbursement claims and only claim reimbursement for NDIS supports I have paid for, with a valid receipt or tax invoice.
- Keep my own records of what I have bought with NDIS funding and respond to information requests from the NDIA when asked (see section 6.6).
- Treat JP Plan Management staff with courtesy and respect and talk to us about any issues or concerns with our service.
- Be contacted, if required, for regulatory, quality or audit purposes about our services, and allow my records to be reviewed by authorised third parties (for example NDIS auditors).
- Receive documents, statements and updates electronically, unless I ask for another format.

5. Monthly statements and the Participant Portal

5.1 Monthly statements. We will automatically send you (and your nominee, if you have one) a monthly statement. It will show:

- payments made to each provider and reimbursements paid to you during the month;
- how much of each budget has been spent, and the remaining balance;
- how your spending compares with the funds released for the current funding period and your total plan funding;
- any invoices on hold, rejected or awaiting your approval; and
- any concerns we have about overspending or funds running out early.

5.2 Participant Portal. We will give you secure login access to our Participant Portal (and app, where available) at no cost. You can use it to monitor your budgets and balances by support category and funding period, view and approve invoices, and see your payment history and statements at any time.

5.3 About the balances shown. Portal and statement balances reflect the invoices we have received and processed. They may not include invoices providers have not yet sent us, or bookings you have made. The NDIA's records (my NDIS app/portal) are the official record of your plan funding. Please allow for unbilled supports when planning your spending.

5.4 Support coordinator access. If you have support coordination in your plan and you give consent in the Sign-Up section, your support coordinator will be given read-only access to your Participant Portal information to help with budgeting and engaging providers.

6. Claims compliance and liability

6.1 Only NDIS supports can be paid. NDIS funding can only be used for NDIS supports under section 10 of the NDIS Act and the NDIS support lists. Since 3 October 2025, the NDIA may raise a debt for funding used on something that is not a NDIS support, regardless of the amount. Items on the replacement support list need NDIA approval **before** they are bought.

6.2 Your choices. Under the NDIS you have choice and control over the supports you buy within your plan. Because you choose and approve the supports, you are responsible for making sure they are NDIS supports, are consistent with your plan and were delivered as invoiced.

6.3 Our checks. Before paying an invoice, we check that it is a valid tax invoice from an identifiable provider; that the support item and description appear to match a NDIS support and your plan budget; that the price is within the price limits; that the date of service is within your plan; and that there are enough funds in the correct budget and funding period. If we have a concern, we will contact you and may hold the invoice, ask the provider for a corrected invoice, or decline to pay it. Our checks do not replace your responsibility under 6.2 – for example, we cannot confirm that a support was delivered.

6.4 Who is responsible if a claim is not compliant. If the NDIA decides that funding was not spent in line with your plan or on NDIS supports and raises a debt under section 46 of the NDIS Act:

- **You (the participant / nominee) are responsible** where the debt relates to a support you or your nominee chose, bought, approved, or did not query within the approval timeframe (including auto-approved invoices under section 8.3), or to information you gave us that was incorrect or incomplete.
- **JP Plan Management is responsible** where the loss is caused by our own error – for example paying above the price limit, paying the wrong provider, a duplicate payment, a processing or data-entry error, or a claim we submitted late after receiving a complete invoice in time. We will correct these at our own cost and will not pass them on to you.
- **Providers are responsible** for the accuracy of their invoices and for delivering supports as invoiced. Where a provider has invoiced incorrectly, we will ask the provider to correct or refund the amount and will help you to do the same.

6.5 If the NDIA raises a debt. We will tell you as soon as we become aware of it, give you copies of the relevant invoices and records, and help you understand your options, including asking the NDIA for a review, waiver or payment plan. The NDIA may also change how your plan is managed or shorten your funding periods if it has compliance concerns. Nothing in this agreement removes any rights you have under the Australian Consumer Law.

6.6 Records and information requests. You should keep records of how your NDIS funding was spent (the law now requires participants to keep records for 3 years and nominees for 5 years). Copies of invoices and statements we hold are available to you in the Participant Portal or on request. If the NDIA asks you for information, please respond – the NDIA may suspend a plan where repeated requests are not answered.

7. Funding periods, budgets and plan overspends

7.1 How funding periods work. Under section 33 of the NDIS Act, plans made since 19 May 2025 release funding in funding periods (commonly every 3 months; some supports monthly or 12-monthly). Unused funds roll over to later funding periods in the same plan, but future funding cannot be drawn on early, and unused funds do not carry over into a new plan.

7.2 We can only pay from available funds. We can only pay an invoice from funds that are available in the correct budget and the funding period in which the support was delivered. The NDIA will not pay claims that exceed the available funding.

7.3 If there are not enough funds. We will contact you and the provider. The options may be: (a) holding the invoice to be paid when the next funding period is released – only if you and the provider agree, there is enough funding left for the rest of your plan, and it can still be claimed within the NDIA claiming timeframe; (b) you paying the provider directly; or (c) the provider adjusting or withdrawing the invoice. JP Plan Management is not liable to pay any amount that cannot be paid from your available plan funding. Any unpaid amount is a matter between you and the provider under your agreement with them.

7.4 Plan overspends. You are responsible for any supports you receive that cost more than your plan budget or the funds available in a funding period. To help you avoid overspending, we will flag spending that is tracking ahead of your funding period in your monthly statement and the Participant Portal and contact you where we have concerns. In line with NDIA guidance, we may also need to tell the NDIA if your funding is being used up too quickly.

7.5 Price limits. Providers must not charge plan-managed participants more than the NDIS price limits. We will only pay up to the price limit and will ask the provider for a corrected invoice. Please check prices with providers before agreeing to supports.

7.6 Plan changes and new plans. Supports must be claimed against the plan that was in place on the day they were delivered. We cannot pay for supports delivered while you have no current plan or no plan management endorsement in place.

8. Invoices, approvals and claiming timeframes

8.1 NDIA claiming time limit. From 1 December 2026, claims must be made to the NDIA within 90 days of the date the support was delivered (section 45A of the NDIS Act, as amended in 2026). Claims made after this may be rejected. To allow time for approval and processing, invoices should reach us within 7 days of the support and no later than 60 days after the support.

8.2 Late invoices. If an invoice reaches us too late to be claimed, or the NDIA rejects it as late, the amount cannot be paid from your plan. It will be a matter between you and the provider, unless the delay was caused by us (see section 6.4).

8.3 Approving invoices. You will be notified of invoices to approve by your chosen method. Invoices that have not been approved or queried within 5 days of notification will be treated as approved and paid. If you have chosen pre-approval for regular providers, you agree to review your statements and tell us promptly about any errors.

8.4 Reimbursements. Send us a receipt or tax invoice showing the provider, date, support and amount paid. Reimbursements are only available for NDIS supports in your plan and are subject to the same timeframes and checks as provider invoices.

9. Sharing of information and privacy

To manage your plan we need to collect, use and share some of your personal information. We handle it in line with the Privacy Act 1988, the Australian Privacy Principles, the NDIS Act and our privacy policy (available on our website). By signing this agreement, you consent to us:

- communicating with the NDIA, your providers, support coordinator, therapists and others involved in your supports about the financial aspects of your plan, as needed to deliver our service;
- sharing information with the NDIS Quality and Safeguards Commission, auditors and other authorised bodies where required for regulation, audit or by law; and
- giving your support coordinator read-only Participant Portal access, if you tick that consent in the Sign-Up section.

You can change or withdraw your consent at any time by telling us in writing, although some information sharing is required by law and limiting it may affect our ability to pay invoices. You can ask to see or correct the information we hold about you.

10. Feedback, complaints and support

We welcome your feedback, and you will not be treated differently because you make a complaint. Contact us on **0401 034 538**, by email at **contact@jppm.com.au**, filling out the complaints form found under the INFO links tab, or as set out in the feedback policy available on the website. You can ask to be emailed a copy at any time.

If you are not satisfied with how we handled your complaint, or you do not want to raise it with us, you can contact:

- **NDIS Quality and Safeguards Commission** – 1800 035 544 or www.ndiscommission.gov.au
- **National Disability Insurance Agency (NDIA)** – 1800 800 110 or www.ndis.gov.au
- **Interpreter** – Translating and Interpreting Service (TIS National) 131 450; **National Relay Service** 133 677
- **Independent advocacy** – Disability Advocacy Finder: www.disabilityadvocacyfinder.dss.gov.au

11. Changes to this agreement

If we need to change this agreement, we will tell you in writing (by email) at least 14 days before the change takes effect, unless the change is required sooner by law or by the NDIA. If you do not agree with a change, you can end this agreement without any penalty. If you continue to use our service after the change takes effect, you will be taken to have accepted it. Any change you would like to make can be agreed with us in writing.

12. Ending this agreement

12.1 Continuing service. We will automatically continue our service when you receive a new plan that includes plan management, unless you tell us in writing that you want to stop.

12.2 If you want to end the agreement. You can end this agreement at any time. We ask for 7 days' written notice before you change to a new plan manager or management type. You will also need to tell the NDIA (through my NDIS app/portal, your NDIS contact or 1800 800 110) so our endorsement can be removed.

12.3 If we end the agreement. We will give you at least 14 days' written notice and keep providing our service during the notice period, unless the law or the NDIA requires otherwise.

12.4 After the agreement ends. Once our endorsement is removed in the NDIA system, we can no longer make claims or payments for you. We will forward any unpaid invoices we hold to you or your new plan manager and provide a final statement. We are not responsible for invoices not received by us before the service ended, even if they are for supports delivered while we were your plan manager – please contact your providers and let them know who will be paying them.

12.5 Future NDIS changes. The NDIA has announced that from October 2027 plan management will be delivered by providers on a NDIA plan management panel. We will let you know in writing how any such change affects your service.

13. Acceptance and sign-up

Please complete the details below, tick the boxes that apply, then sign. A copy of this signed agreement will be available for you to download and will be sent to JP Plan Management with your Web Sign-Up Form. Please keep a copy – we will store the signed copy securely with your client records.

Participant details

Participant full name	
NDIS number	
Date of birth	
Current plan start and end dates	
Phone and email	
Nominee / authorised representative (if applicable)	Name and relationship to participant:
Support coordinator (if applicable)	Name and organisation:

How I want to approve invoices (tick one)

- ☐ **Participant Portal** (recommended) – I will approve invoices in the Participant Portal within 24 hours of notification, or I will decline with a reason to ensure claims do not get paid
- ☐ **Email** – I will approve invoices by replying to JP Plan Management's email within 24 hours.
- ☐ **Pre-approved for my regular providers** – JP Plan Management may pay invoices from providers I have agreed to without separate approval. I will check my monthly statements and the Participant Portal and report any errors promptly and JP will forward a copy to my nominated email.

Acknowledgements and consents (please tick)

- ☐ I have read and understood this Service Agreement, or had it explained to me, and I agree to its terms.
- ☐ I understand that I am responsible for ensuring the supports I buy are NDIS supports, consistent with my plan, and within the funds available in my budget and current funding period (sections 6 and 7).
- ☐ I understand that JP Plan Management cannot pay invoices that exceed my available plan funding or that are claimed outside the NDIA claiming timeframe, and that any unpaid amount is a matter between me and the provider unless caused by JP Plan Management's error.
- ☐ I understand I will receive monthly statements and access to the Participant Portal to monitor my funding and budget balances.
- ☐ I consent to JP Plan Management sharing information as described in section 9.
- ☐ I consent to my support coordinator having read-only access to my Participant Portal information (if applicable).
- ☐ I agree to receive documents, statements and notices electronically or by post.

Signatures

Signature of Participant / Nominee	
Full name	
If signed by a nominee or representative – capacity	e.g. plan nominee, child representative, guardian
Date	