

# Service Agreement

## Financial Plan Management

### WHY AM I RECEIVING THIS DOCUMENT?

This document is a service agreement. You have received it;

**A:** after having a meeting (face to face, via phone or other online engagement) with our intake team and requesting Leisure Networks provide Financial Plan Management services for your current NDIS plan or

**B:** You are already accessing services with Leisure Networks FPM and have a new plan or early plan review.

As recommended by the National Disability Insurance Agency (the agency), you should now enter into a service agreement with us to ensure we understand the supports you have chosen and how you want them provided to you.

### WHAT IS A SERVICE AGREEMENT?

A service agreement gives us all the information we need to ensure we provide you with the best service. It also ensures you understand your role in being financially plan managed. The following pages outline:

- a) the service to be provided by Leisure Networks, as your Financial Plan Manager
- b) the duration of these services
- c) the roles and responsibilities of both parties
- d) how to resolve any problems
- e) what happens if you want to change or cancel plan management services

### WHAT DO I NEED TO DO WITH THIS AGREEMENT?

You need to read each section and make sure you understand what you are agreeing to. If you need assistance in understanding this, you can nominate a Guardian or Authorised Representative (such as a family member, your support coordinator or Local Area Coordinator) to assist you. You can also use the checklist provided by the agency to ensure you have all in the information you need in this agreement. You can find this on their website:

<https://www.ndis.gov.au/participants/working-providers/making-service-agreement#things-to-consider-when-making-a-service-agreement>

If you are happy to proceed, you (or your representative on your behalf) need to sign the agreement.

If you would prefer to approve this agreement verbally, we can arrange to record your consent over the phone. Please telephone (03) 5224 9992 and select 2 for this option or call 1800 LNPLAN (567526)

### SOME IMPORTANT INFORMATION BEFORE YOU PROCEED:

As your Financial Plan Manager, our advice to you is independent and in line with the Leisure Networks' Conflict of Business Interest policy. After reading this agreement, if you do not believe our service meets your needs, you can find further provider options on the NDIA website.



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This document outlines our responsibilities to each other to ensure Leisure Networks' plan management services allow you to exercise greater choice and control over the supports and services you access through your NDIS funding.



# Service Agreement

## Financial Plan Management

### PARTIES

This Service Agreement is for

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(Participant name and NDIS number)

And is made between the above Participant or Guardian/ Authorised Representative:

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(Guardian/Authorized Representative name)

And

Provider: Leisure Networks Association Inc

### OUR RESPONSIBILITIES TO YOU:

As your financial plan managers, Leisure Networks will:

- Manage and monitor your NDIS plan budget within its current plan dates
- Keep accurate records on the service provided to you, the participant, and provide you with regular (at least monthly) statements showing the financial status of your plan
- Communicate openly and honestly in a timely manner
- Treat you with courtesy and respect
- Listen to your feedback and resolve any problems in a timely manner
- Protect your privacy and confidential information
- Give you notice if we need to end the service agreement earlier than the end plan date
- Provide supports in a manner consistent with all relevant laws, including the National Disability Insurance Scheme Act 2013 and rules

### YOUR RESPONSIBILITY TO US:

When agreeing to use Leisure Networks as your Financial Plan Manager you will:

- Inform Leisure Networks about how you wish your supports to be delivered to meet your needs
- Inform Leisure Networks of any service agreements you have in place with providers and services, so that Leisure Networks can best manage your budget, ensuring it is not under-utilised or overspent
- Treat Leisure Networks staff with courtesy and respect
- Talk to Leisure Networks if you have any concerns about your plan management or the services we are providing
- Give Leisure Networks notice if you need to end this service agreement early

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- Contact Leisure Networks immediately if your NDIS plan is suspended or replaced by a new NDIS plan or if you stop being a participant in the NDIS
- Approve of your personal information (name, address, contact details, age, date of birth, health information and other information relating to your support network) being kept on file, per the details below.

### YOUR PERSONAL INFORMATION – WHAT WILL WE DO WITH IT?

Your information is collected so we can safely and appropriately provide services to you. We may collect such information from third parties where it is unreasonable or impracticable for us to collect it from you directly. Your information is stored electronically by Leisure Networks and is protected by state-of-the-art cyber security and is backed up frequently.

Leisure Networks will be vigilant in protecting your personal information, as per our Privacy Policy which can be found on our website: [Privacy Policy Link](#)

In signing this agreement, you provide your consent for Leisure Networks to use your personal information in the following ways:

- Collecting personal information for the primary purpose of providing Leisure Networks services, including collecting such information from third parties where it is unreasonable or impracticable for us to collect it from you directly
- Saving your personal information on our secure Client Management System which is able to be accessed by you by contacting our Financial Plan Management Customer Service team
- Using and disclosing personal information for the following purposes;
  - Leisure Networks services
  - Other purposes as may be permitted or required under the NDIS Practice Standards
  - For use by our employees, related bodies corporate, agents, contractors, service providers, health providers, financial institutions payment system operators, persons acting on your behalf, regulatory bodies, law enforcement agencies and government agencies
  - Your information may be shared to external parties without your consent if required or authorised by law, for example as part of an investigation or in an emergency.

### HOW DO WE PAY YOUR PROVIDERS?

Leisure Networks will receive invoices from your providers and claim your funding from the NDIA up to the amounts specified in your approved budget in your NDIS plan.



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All Invoices received in the [accounts@leisurenetworks.org](mailto:accounts@leisurenetworks.org) email are deemed ready to pay and entered into our system to claim and make payment to your providers.

You can view Invoices on the LN Customer Portal or via the monthly statements.

### HOW DO YOU PAY FOR YOUR FINANCIAL PLAN MANAGEMENT WITH LEISURE NETWORKS?

From the Start Date of this agreement, Leisure Networks will automatically invoice the NDIA for the plan management services we provide to you. These fees are paid by the NDIA and do not affect your Individual Plan budgets.

- **Fees Include:** Plan Set up Cost and Monthly Fees

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### RENEWING YOUR SERVICE AGREEMENT

This Service Agreement will be in effect for the duration of your current plan. In the event on an early plan review, you have the ability to select **AUTOMATIC** renewal, which will ensure uninterrupted continuation of service.

**YES, I would like to take up the option of Automatic renewal**

If you change your mind about the auto renewal of your service agreement with Leisure Networks, you can contact our Customer Service Team on 03 5224 9992 to let us know.

### ENDING YOUR SERVICE AGREEMENT

If you decide to end your agreement with Leisure Networks, **we require 30 days notification** and ask that you contact our intake team as soon as possible so we can ensure a smooth transition to a new provider and that payments are up to date before ceasing services. Leisure Networks is obliged to pay all invoices received for services provide up until the date of ending the agreement.

### COMPLIMENTS, FEEDBACK, COMPLAINTS AND DISPUTES

If you or your Guardian/Authorised Representative wishes to provide compliments, feedback, complaints or suggestions to assist with continuous improvement, we encourage you to contact us via;



*Phone*  
(03) 5222 3911



*Email*  
info@leisurenetworks.org

If you are not satisfied with the response from Leisure Networks including the opportunity to escalate your concerns through Leisure Networks management, you can contact the National Disability Insurance Agency by calling 1800 800110, visiting one of their offices in person, or visiting <https://www.ndis.gov.au/contact/feed-back-and-complaints> for NDIS feedback and complaints information.

### TERMS OF BUSINESS

Leisure Networks agree to provide you, the Participant, Financial Plan Management services - provided the funds are available on the NDIA portal for the purposes of this agreement.

All prices are GST inclusive (if applicable) and include the cost of providing the supports. Additional expenses. (i.e. things that are not included as part of a Participants NDIS supports as per the NDIS Price Guides) are the responsibility of the Participant, their Guardian/Authorised Representative and do not form part of this agreement.



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### NDIS AUDIT

NDIS registered providers are required to be audited against the NDIS Practice Standards as part of the NDIS Quality and Safeguarding Framework. Clients of Leisure Networks can choose to participate in the audit processes and may be contacted by the audit team for interviews and/or have their files reviewed to ensure Leisure Networks is compliant. If you wish to participate in the audit you can opt into of the process by ticking the box below.

**I wish to be part of the audit process**



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### Participant details \*

- Full Name:
- NDIS Number:
- Date of Birth:
- Address:
  
- Email:
- Phone:
- Plan Start Date
- Plan End Date:

*\*If any of the above Information has changed, please contact our Customer Service Team and they will update this for you. You can contact them on (03) 5224 9992 and select 2 for this option or call 1800 LNPLAN (567526)*

*\*\* The plan end date Is Indicative and will be aligned with your current plan period.*





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### Plan Extension

In the event of a “**Plan extension**”, Leisure Networks will continue to provide Financial Plan Management Service unless otherwise advised. Leisure Networks will extend their service booking and continue to claim costs against the plan.

Please tick the relevant box below. \*

I am the participant responsible for my own plan

I am a parent for a participant under the age of 18 of age.

I am the guardian / authorized representative of the participant\*\*

\*\*Please provide supporting documentation if you are the guardian or authorized representative

### Service Agreement

**Representative.** Participant or guardian/ authorized Representative Contact details: \*

- Full Name:
- Phone:
- Mobile:
- Email:
- Relationship:
- Preferred method of contact:

For **Leisure Networks** staff to discuss personal and plan information over the phone or via email with additional parties such as Secondary Contacts (your parents, co-parent/ guardians, grandparents etc), Support coordinators or others please return the separate “Consent to Share form”

Link to LN FPM documents: [Financial Plan Management Forms – Leisure Networks](#)

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### AGREEMENT SIGNATURES

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

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*Signature of Participant and/or  
the Guardian/Authorised  
Representative*

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*Date*



*Elizabeth Mears  
Chief Executive Officer Leisure Networks*

Thank you for choosing LEISURE NETWORKS as your NDIS Plan Manager, we look forward to supporting you.

If you have any questions, please contact us on the below details.



**Call us** (03) 5224 9992 or 1800 LNPLAN (567526)



**Email us** [fpmintake@leisurenetworks.org](mailto:fpmintake@leisurenetworks.org)



**Visit us** [www.leisurenetworks.org](http://www.leisurenetworks.org)