



Genesis Plan Management

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ACN: 653 329 081

NDIS Org ID: 4050069746

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## GENESIS PLAN MANAGEMENT SERVICE AGREEMENT

### FOR THE PROVISION OF FINANCIAL INTERMEDIARY (NDIS PLAN MANAGEMENT)

#### **Parties:**

This Service Agreement is between *Genesis Plan Management* and the participant/nominated representative in the National Disability Insurance Scheme.

*This Service Agreement will be in effect from today for the duration of the participant's association with Genesis Plan Management, until we are notified otherwise in writing by the participant/nominated representative.*

To engage the services of *Genesis Plan Management*, upon acceptance of this Service Agreement, the participant/nominated representative, will provide their NDIS plan details, and NDIS Number to *Genesis Plan Management*.

#### **Schedule of Supports:**

*Genesis Plan Management* agrees to provide the participant financial administration. The supports and their prices are set out in the below Schedule

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NDIS  
PROVIDER

of Supports (page 5). 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 Participant's NDIS supports) are the responsibility of the Participant/nominated representative and are not included in the cost of the supports.

### **Responsibilities of Provider:**

*Genesis Plan Management to:*

- Provide financial administration services
- Reconcile client balances
- Pay supplier invoices on behalf of client
- Process client reimbursement claims
- Track expenditure against client budget
- Provide monthly statements of expenditure (includes to Support Coordinators) and available funding upon request
- Provide troubleshooting for issues
- Engage in client liaison – emails, phone calls etc
- Consult the participant/nominated representative on request, regarding decisions about how funds are spent
- Communicate openly and honestly in a timely manner
- Treat the participant/nominated representative with courtesy and respect
- Listen to the participant/nominated representative's feedback and resolve problems quickly
- Protect the participant's privacy and confidential information as per [Genesis Plan Management Privacy Policy](#) available on the Genesis Plan Management website.

### **Responsibilities of Participant/Nominated Representative:**

I agree to:

- Take due steps to provide information as requested by *Genesis Plan Management* in a timely manner
- Treat *Genesis Plan Management* staff with courtesy and respect
- Discuss any concerns about our service with *Genesis Plan Management*



- Advise *Genesis Plan Management* immediately if the participant's NDIS plan is suspended or replaced by a new NDIS plan, or the participant stops being a participant in the NDIS.

### Payments:

Please make sure the following details are included in the invoice for a smooth and quick invoice processing by the NDIS.

- Your business name, **ABN** and bank details
- An invoice number
- The participant's full name and NDIS number
- The service provided
- The date that the invoice was issued AND the date the service was delivered
- The **TOTAL** number of hours of support provided and at what hourly rate (including the NDIS line-item number – **A MUST**)
- Invoice total (including GST - the GST cannot be on top of the maximum hourly rate).

*Genesis Plan Management* will claim directly from the NDIA an agreed 12 Month Fee (including set-up fee) for the provision of support as agreed in Schedule of Supports – Improved Life Choices, upon acceptance of the Service Agreement. By nominating *Genesis Plan Management* to provide plan management services and manage the funding, we will claim from the NDIA portal for funding up to the amounts specified in the support category and budget approved in the participant's current NDIS plan. After these supports are delivered, the service provider or Participant/nominated representative will claim payment for those supports from *Genesis Plan Management* by forwarding an invoice

to: [accounts@genesisplan.com.au](mailto:accounts@genesisplan.com.au)

***Please note we can only process invoices which are sent to us as PDF, WORD or Excel files, so do not send links to your invoices.***



### **Participant Budgets to be Managed:**

The participant/nominated representative will provide *Genesis Plan Management* details of their support budgets as per the participant's current NDIS plan.

If the support categories or budgets change, the participant/nominated representative agrees any changes will be submitted immediately in writing to *Genesis Plan Management*, signed, and dated by the participant/nominated representative.

### **Changes to the Plan:**

The participant/nominated representative, agrees to immediately notify *Genesis Plan Management* and provide relevant plan details in writing, if the participant's NDIS Plan is replaced by a new plan, or the participant ceases to be a participant in the NDIS.

### **Ending this Service Agreement:**

Should either party wish to end this Service Agreement they must give one month's notice in writing. If either party seriously breaches this Service Agreement the requirement of notice will be waived.

### **Feedback, Complaints and Disputes:**

If the participant/nominated representative wishes to provide feedback, or is not satisfied with the provision of supports and wishes to make a complaint, the participant/nominated representative can contact Management on 0460 754 899 or by email [info@genesisplan.com.au](mailto:info@genesisplan.com.au) or postal - PO BOX 6084 Clyde VIC 3978

### 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 the participant's NDIS plan currently in effect under section 37 of the NDIS Act;
- *Genesis Plan Management* will pay GST as per specified in *National Disability Insurance Scheme Act 2013* (NDIS Act)

Support Item	Description of Support	Price Limit
<b>Plan Management and Financial Capacity Building -Set Up Costs</b> (14_033_0127_8_3)	A one-off (per plan) establishment fee for setting up of the financial management arrangements for managing of funding of supports	<b>EACH</b> \$ 232.35 – National \$ 325.29 – Remote \$ 348.54 – Very Remote Set-up fee (if included in your plan)
<b>Plan Management -Financial Administration</b> (14_034_0127_8_3)	A monthly fee for the ongoing maintenance of the financial management arrangements for managing of funding of supports.	<b>MONTH</b> \$104.45 – National \$146.23 – Remote \$ 156.67 – Very Remote
<b>Plan and Financial Capacity Building</b> (14_031_0127_8_3)	Undertaking regular liaison with a Participant to strengthening their ability to undertake tasks associated with the management of their supports. Providers of this support are to assist the participants with the overall management of the plan including assisting the participant to engage providers and claiming payment from the NDIA and assisting the participant to maintain records.	<b>HOUR</b> \$61.76 – National \$86.46 – Remote \$92.64 - Very Remote Per hour (if included in your plan)



*Please note - any changes are in accordance with the NDIA pricing guide. \* Disclaimer: Genesis Plan Management information is provided in good faith, to the best of our knowledge and is considered to be correct at the time of communication, however, changes may affect this accuracy therefore Genesis Plan Management gives no assurance as to the accuracy of any information or advice given.*

*Any advice given by Genesis Plan Management outside of financial administration advice shall be considered general in nature. Genesis Plan Management shall not be liable for any failure of, or delay in the performance of this service agreement for the period that such failure or delay is;*

- 1. Beyond the reasonable control of a party,*
- 2. Materially affects the performance of any of its obligations under this agreement, and*
- 3. Could not reasonably have been foreseen or provided against (e.g., Government Acts prohibiting or impeding any party from performing its respective obligations under the Service Agreement contract) or (e.g., prolonged lack of power supply).*

*Nothing in the Genesis Plan Management Service Agreement negates or diminishes the statutory guarantees regarding the supply of services the participant/nominated representative receive under The Australian Consumer Law (Competition and Consumer Act 2010 – Schedule 2).*

*Genesis Plan Management takes in good faith the information provided by the participant/nominated representative to be true and accurate, and that claims presented by Genesis Plan Management are a true reflection of goods and services provided to the Participant in line with the NDIS guidelines (National Disability Insurance Scheme Act 2013).*

### **Contact and Banking Details:**

The participant/nominated representative will provide bank details if necessary, to *Genesis Plan Management* for reimbursement.

#### **The Provider can be contacted on:**

Phone: 0460 754 899

Email: [info@geneisplan.com.au](mailto:info@geneisplan.com.au)

