

Tropical North Bookkeeping

General Service Agreement Template

MAIN OFFICE

Ph: 0422 069 714

E: admin@tropicalnorthbookkeeping.com.au

Disclaimer

This is a general service agreement template given to providers who work with Tropical North Bookkeeping for the purpose of referring clients to our plan management services. While we will do our best to ensure providers who we directly give a copy of this template get updates to our service agreement, we are not responsible for any providers whom may have outdated copies of our general service agreement.

If we are unable to accept the referral, we will be in contact to let you know.

What is Plan Management?

Plan management is a type of funding management for NDIS Plans. Plan managers have to adhere to the NDIS Price Guide, and will assist plan managed clients with drawing on their NDIS budget and paying their NDIS invoices for them. Plan managers can also provide:

- Feedback on service agreements
- Feedback on budget
- Assist with budget planning and the financial side of planning supports
- Education to the NDIS participant over the NDIS Price Guide
- Negotiation with service providers over invoices
- Monthly statements of NDIS expenditure

What to do after being referred?

Contact Tropical North Bookkeeping with a copy of your NDIS plan, this completed service agreement (if your provider has not already sent it on to us), copies of your other signed service agreements, and let us know if you have any questions.

Service Agreement for the provision of Financial Administration / Plan Management

Parties

This service agreement is between Tropical North Bookkeeping and _____,
a participant/their nominee in the National Disability Insurance Scheme.

NDIS Alignment

This agreement is made according to the rules and the goals of the National Disability Insurance Scheme (NDIS). A copy of the participant's NDIS Plan is attached to this Agreement.

TNB maintains membership with The Institute of Certified Bookkeepers and is bound by its professional code of conduct. A copy of the code can be located at:

<https://www.icb.org.au/membership/code-of-conduct>

Agreement Period

This Service Agreement will be in effect from: _____ for the duration
of the participant's current plan, ending on: _____.

The participant/their nominee has signed here _____, to consent to
continuing this service agreement on an ongoing basis for future plans by sending any new plan to
Tropical North Bookkeeping to plan manage.

Changes to Plan

The participant/nominated representative, agrees to immediately notify Tropical North Bookkeeping,
if the participant's NDIS Plan is replaced by a new plan, or the participant ceases to be a participant
in the NDIS. If the participant wishes to continue plan management services, they must also forward
a copy of the new plan to their appointed Plan Manager.

Schedule of Supports

The schedule of supports is the services that Tropical North Bookkeeping agrees to provide to the
participant under this agreement.

The supports and their prices are set out in the following schedule. All are GST FREE and include
the cost of providing the supports.

Please note: The NDIS price guide / schedule of supports is updated each year at minimum to provide changes to services and pricing. If the update should reflect an increase to the below item numbers, then the new pricing will be automatically added to future invoices, as the NDIS will update the funding budget (without review) to bring the funding package in line with the guide.

NDIS FUNDING CATEGORY: IMPROVED LIFE CHOICES		
Plan Management & Financial Capacity Building - Set Up Costs 14_033_0127_8_3	An one-off (per plan) establishment fee for setting up of the financial management arrangements for managing of funding of supports.	\$232.35 per Plan Period
Plan Management - Financial Administration 14_034_0127_8_3	A monthly fee for the ongoing maintenance of the financial management arrangements for managing of funding of supports.	\$104.45 per Month
CB and Training in Plan and Financial Management by a Plan Manager 14_031_0127_8_3	A hourly fee for capacity building to undertake all aspects of plan administration and management, including engaging providers, developing service agreements, maintaining records, paying providers, and claiming payments from the NDIA.	\$61.76 per Hour
Travel Charges	<p>Travel charges are incurred if Tropical North Bookkeeping travels to you. Travel is billed at your main support rate, which covers the labour costs (time) of travel. In addition we will also charge non-labour costs such as road tolls, parking fees and running costs. The NDIA have currently determined 85 cents per kilometre is a reasonable contribution to these costs.</p> <p>The maximum of travel time to reach a participant that will be claimed is 30 minutes in MMM 1-3 areas and 60 minutes in MMM 4-5 areas. The maximum return travel time from the last participant to our usual place of work will be 30 minutes in MMM 1-3 areas and 60 minutes in MMM 4-5 areas.</p>	<p>Main support rate</p> <p>Non labour costs</p> <p>85c per km</p>

Responsibilities of Tropical North Bookkeeping

- Develop budget (if requested) in accordance with plan and input from Participant/their nominee at start of engagement and review as indicated.
- Contact providers on behalf of Participant/nominee to set up payment arrangements upon engagement, as requested by Participant / nominee
- Provide financial administration services
- Claim for and pay supplier invoices sent to admin@tropicalnorthbookkeeping.com.au

- Track expenditure against Participant plan & issue monthly statements
 - Assist with sourcing quotations and purchases where appropriate
 - Consult the Participant/nominee on request regarding decisions about how funds are spent
 - Communicate openly and honestly in a timely manner
 - Protect the Clients privacy and confidentiality
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Responsibilities of Participant / Nominee

- Provide information as requested by Tropical North Bookkeeping in a timely manner
 - Discuss any concerns about our service with us
 - Advise Tropical North Bookkeeping 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.
 - Give providers this email address admin@tropicalnorthbookkeeping.com.au for them to send their invoices to for payment. Participant name needs to be in the subject of the email where possible.
 - Keep your details current with us eg. NDIS Plans, Contact Details, Support Coordinators.
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Payments

Tropical North Bookkeeping will claim directly from the NDIA a setup fee for the provision of support as agreed in Schedule of Supports. TNB will then claim a monthly fee as specified by this agreement monthly in advance of services, directly from the NDIA.

Tropical North Bookkeeping can claim for funding up to the amounts specified in the support category and budget approved in the participants' current NDIS plan. Amounts will be claimed upon presentation of invoice by provider or via participant / nominee to TNB; and paid to the provider on behalf of the participant in agreement with terms of individual payment arrangements.

Working with Support Coordinators

Tropical North Bookkeeping can work with the participant's support coordinator if there is one. In giving TNB the following information, the participant/nominee gives permission for TNB to add the support coordinator to our system. This enables them to see the participant budget, what has been spent, and what is remaining. This will assist them to coordinate supports more effectively and within the allocated budget.

Name of Support Coordinator

Name of Company or Business

Email address

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.






Goods and Services Tax (GST)

A supply of supports under this Service Agreement 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, is not a taxable supply. Tropical North Bookkeeping will not charge GST as per specified in National Disability Insurance Scheme Act 2013 (NDIS Act).

Feedback, Complaints & Disputes

If the Participant/nominee wishes to provide feedback, or is not satisfied with the provision of supports and wishes to make a complaint, the participant/nominee can contact management on 0422069714 or by email admin@tropicalnorthbookkeeping.com . We also have a complaints management policy that can be provided in PDF or hard copy at request.

If we are not able to resolve your complaint at Management level and you would like your complaint to be lodged further, you may contact the NDIS Commission by Phoning: 1800 035 544 (free call from landlines) or TTY 133 677. Interpreters can be arranged. Further information can be found at: <https://www.ndiscommission.gov.au/about/complaints>

 PARTICIPANT DETAILS	
NAME:	
NDIS NUMBER:	
DATE OF BIRTH:	
 ADDRESS:	
CONTACT DETAILS	
NAME OF NOMINEE IF ANY	
 PHONE:	
 EMAIL:	
	Name & phone number of someone we can contact if we can't get in touch with you:

Consent to Share Information

By signing here _____ I agree that Tropical North Bookkeeping may share my name, date of birth, contact details and plan goals with third party providers on my behalf for the purpose of referring me to services that I have requested.

Tropical North Bookkeeping will not disclose any aspect of my funding or budget with other providers without additional consent. I understand that I may withdraw this consent at any time by notifying Tropical North Bookkeeping

TROPICAL NORTH BOOKKEEPING

MAIN OFFICE

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PLAN MANAGERS

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The Service Provider and the Participant hereby agree to this Service Agreement:

Signed by the Participant / or Nominee

Signed by TNB Representative

Date

What you need to do now

1. Send a copy of the NDIS Plan to your plan manager.
2. Send a copy of any signed service agreements to your plan manager.
3. Let your providers know their invoices can be sent to admin@tropicalnorthbookkeeping.com with your name in the subject line of the email (where possible).
4. If you need help with ensuring service agreements are compliant with the NDIS Price Guide and are within your Plan budget, send them unsigned to your plan manager for feedback.