



Service Agreement – NDIS Plan Management

Between JP Plan Management Pty Ltd (NDIS registered provider 4050123867) and the Participant and/or Nominee named in the Sign-up section

By signing this agreement (or submitting the JPPM Web Sign-up Form), you confirm you have read and understood it, or had it explained to you, and agree to it. Please keep a copy.

If you would like it explained, in Easy Read or another format or language, or read with a support person or advocate, please contact us before you sign.

1. About this agreement

This agreement explains how JP Plan Management Pty Ltd ("JPPM", "we", "us") will manage the funding in your NDIS plan, and what you agree to do. "You" means the participant, or their nominee, parent or authorised representative.

- **Start:** the date you sign this agreement or submit the Web Sign-up Form.
- **Length:** it continues while you use our service, including new or reassessed plans that include plan management, until it is ended under section 12.
- **Getting started:** you give us your NDIS number and a copy of your current plan, and choose JPPM as your plan manager with the NDIA (in the my NDIS app or portal, through your NDIS contact, or by calling 1800 800 110).
- **The law comes first:** this agreement follows the NDIS Act 2013 (as amended), the NDIS Rules and support lists, the NDIS Pricing Arrangements and Price Limits, the NDIS Code of Conduct and the Australian Consumer Law. If the law or NDIA requirements change, the law applies and we will update this agreement.

Term	What it means
NDIS supports	Supports that can 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 NDIA-approved "replacement support".
Funding period	The part of a budget the NDIA releases for a set time (for example every 3 months). Funds can only be spent once they are released.
Price limits	The maximum prices providers can charge plan-managed participants under the NDIS Pricing Arrangements in force at the time.
Participant Portal	Our secure online portal (and app, where available) where you can see budgets, balances, invoices and statements and approve invoices.



2. Our service and fees

Support	NDIS item	Price	Paid from
Plan management – monthly financial administration	14_034_0127_8_3	NDIS price limit at the time	Capacity Building – Improved Life Choices

- Our fees are claimed directly from the plan management funding in your plan. You do not pay our fees, and they do not reduce your other budgets. If the NDIA changes the price limit, our fee changes to match. We charge no other fees.
- We do not offer gifts, payments or other incentives to sign up, and we do not accept payments from providers for referrals.

3. What we will do

- Manage your plan funding in line with the NDIS Act, NDIS Rules and Pricing Arrangements.
- Check each invoice before paying it (see section 6).
- Claim from the NDIA as soon as practical after receiving a complete invoice, and pay providers and your reimbursements within 2 business days of receiving the NDIA payment.
- Send you a monthly statement and give you free access to the Participant Portal.
- Tell you early if your spending is running ahead of your funding period or budget, or if an invoice cannot be paid.
- Explain how your budgets and funding periods work. The choice of supports and providers is always yours.
- Act in your interests, manage any conflict of interest, and never pressure you to use a particular provider.
- Follow the NDIS Code of Conduct and treat you with respect, honesty and courtesy.
- Protect your privacy (see section 10) and keep records for at least 7 years.
- Help you move to another plan manager or type of plan management if you choose.

4. What you agree to do

- Only buy NDIS supports that are consistent with your plan and relate to your disability support needs.
- Check you have enough funds in the right budget and current funding period before agreeing to a support, and check prices with providers.
- Ask providers to send invoices to us promptly – ideally within 7 days of the support – and send us any invoices or receipts you receive.
- Approve or query invoices on time (see section 6) and tell us straight away if an invoice is wrong or a support was not delivered.
- Check your monthly statements and the Participant Portal and tell us if something looks wrong.
- Tell us straight away about a new plan, plan change, change to funding periods, change of nominee, or if your plan ends.
- Give us current bank details for reimbursements, and only claim reimbursement for NDIS supports you have paid for, with a valid receipt or tax invoice.



- Keep your own records of NDIS spending (the law requires participants to keep records for 3 years and nominees for 5 years) and answer NDIA information requests.
- Treat JPPM workers with courtesy and respect.
- Agree to be contacted, and to your records being reviewed, for NDIS audit and quality purposes.
- Receive statements and notices electronically, unless you ask for another format.

5. Statements and the Participant Portal

Your monthly statement shows payments to each provider and to you, how much of each budget has been spent and what is left, spending compared with the current funding period, any invoices on hold or waiting for approval, and any concerns about overspending.

Balances in the portal and statements only include invoices we have received. They do not include supports that providers have not invoiced yet. The NDIA's records (my NDIS) are the official record of your funding. If you agree in the Sign-up section, your support coordinator can have read-only portal access.

6. Invoices, approvals and claiming

- **Our checks:** before paying, we check the invoice is a valid tax invoice from an identifiable provider, appears to be for an NDIS support in your plan, is within price limits, is for a date within your plan, and is covered by available funds in the right budget and funding period. If we have a concern, we will contact you and may hold the invoice, ask the provider to correct it, or decline to pay it. We cannot confirm that a support was actually delivered – only you can.
- **Approving invoices:** you will be told about invoices by the method you choose in the Sign-up section. Please approve or query them within 2 business days. If we have not heard from you within 5 business days, the invoice will be treated as approved and paid.
- **90-day claim limit:** from 1 December 2026, claims must be made to the NDIA within 90 days of the support being delivered. Invoices should reach us within 7 days of the support and no later than 60 days after it.
- **Late invoices:** if an invoice reaches us too late to be claimed, or the NDIA rejects it as late, it cannot be paid from your plan. It is a matter between you and the provider, unless the delay was our fault.
- **Reimbursements:** send us a receipt or tax invoice showing the provider, date, support and amount paid. The same checks and timeframes apply.

7. Funding periods, budgets and overspending

- We can only pay from funds that have been released in the correct budget for the funding period when the support was delivered. Future funding cannot be used early, and unused funds do not carry over to a new plan.
- If there are not enough funds, we will contact you and the provider. The options are: (a) hold the invoice until the next funding period is released – only if you and the provider agree, there is enough funding left in your plan, it can still be claimed in time, and both of you sign JPPM's Funding Period Flexible Claim Agreement; (b) you pay the provider directly; or (c) the provider adjusts or withdraws the invoice.
- You are responsible for supports that cost more than your available funding. We will flag spending that is running ahead in your statement and contact you if we have concerns. We may need to tell the NDIA if funding is being used up too quickly.



- Providers must not charge more than the price limits. We will only pay up to the price limit.
- Supports must be claimed against the plan in place on the day they were delivered. We cannot pay for supports delivered when you have no current plan or JPPM is not your endorsed plan manager.

8. Who is responsible if a claim is not compliant

If the NDIA decides funding was not spent on NDIS supports or in line with your plan, and raises a debt under the NDIS Act:

Who	Responsible for
You	Supports you or your nominee chose, bought or approved, invoices you did not query within the approval time (including auto-approved invoices), and information you gave us that was wrong or incomplete.
JPPM	Losses caused by our own error – for example paying above the price limit, paying the wrong provider, a duplicate payment, a data-entry error, or a claim we submitted late after receiving a complete invoice on time. We will fix these at our own cost and will not pass them on to you.
Providers	The accuracy of their invoices and delivering supports as invoiced. We will ask a provider to correct or refund an incorrect invoice and help you do the same.

If the NDIA raises a debt, we will tell you as soon as we know, give you copies of the relevant records, and help you understand your options, including asking for a review, waiver or payment plan.

9. Limits on our liability

To the extent the law allows, JPPM is not responsible for any loss, cost or debt caused by:

- decisions, delays, errors or system outages of the NDIA, the my NDIS portal, banks or other third parties outside our control;
- the actions, omissions, prices or quality of supports of any provider you choose;
- supports that are not NDIS supports, or not consistent with your plan, that you or your nominee chose or approved;
- invoices or information from you or a provider that are wrong, incomplete or sent to us late;
- amounts that cannot be paid because there are not enough funds in your plan or funding period; or
- any indirect or consequential loss.

This section does not limit our responsibility for our own errors in section 8.

Your rights under the Australian Consumer Law are not affected. Our services come with guarantees that cannot be excluded under the Australian Consumer Law. Nothing in this agreement excludes, restricts or changes those rights or any other right you have under law that cannot be excluded.



10. Privacy and sharing information

We handle your personal information under the Privacy Act 1988 (Cth) and our Privacy Policy (on our website). By signing this agreement, you consent to us sharing information, only as needed, with:

- the NDIA, your providers, support coordinator and others involved in your supports, about the financial side of your plan;
- the NDIS Quality and Safeguards Commission, auditors and other authorised bodies where required for regulation, audit or by law; and
- our back-up plan management provider (another registered NDIS plan manager), if an emergency or the unavailability of key personnel stops JPPM from operating, so your providers keep getting paid.

You can change or withdraw your consent at any time by telling us in writing. Some 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.

11. Feedback and complaints

We welcome your feedback, and you will never be treated differently because you make a complaint. Contact us by phone on 0401 034 538, email contact@jppm.com.au, the Feedback, Complaints & Concerns form on our website (jppm.com.au/contact-us), or post to PO Box 5433, Cranbourne VIC 3977. If you are worried that someone is being harmed, neglected or financially taken advantage of, choose "Report a concern" on the website form or call us. If someone is in danger, call 000. Our Complaints and Feedback Policy and Easy Read guide "Telling us what you think" are on our website or available on request. You can also contact the NDIS Quality and Safeguards Commission at any time on 1800 035 544 or www.ndiscommission.gov.au.

12. Changes and ending this agreement

- **Changes:** we will tell you in writing (by email) before a change takes effect, unless the law or the NDIA requires it sooner. If you do not agree with a change, you can end this agreement without penalty. If you keep using our service after the change takes effect, you accept it. Any change you want to make can be agreed with us in writing.
- **New plans:** our service continues automatically when you receive a new plan that includes plan management, unless you tell us in writing that you want to stop.
- **If you end it:** you can end this agreement at any time. Please give us 7 days' written notice and tell the NDIA so our endorsement is removed.
- **If we end it:** 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.
- **After it ends:** once our NDIA endorsement is removed we can no longer make claims or payments. We will send any unpaid invoices we hold to you or your new plan manager and give you a final statement. We are not responsible for invoices we did not receive before the service ended.
- **Future NDIS changes:** the NDIA has announced that from October 2027 plan management will be delivered by providers on an NDIA plan management panel. We will tell you in writing how this affects your service.



13. Sign-up

Download this agreement from our website, complete it and email it to contact@jppm.com.au, or we will send you a copy to sign when we receive your Web Sign-up Form.

Participant full name	
NDIS number	
Date of birth	
Current plan start and end dates	
Phone and email	
Nominee / authorised representative (if any) – name, contact details, relationship	
Support coordinator (if any) – name, organisation, contact details	
Emergency contact (required) – name, contact details, relationship	

How I want to approve invoices (tick one)

- ☐ **Participant Portal (recommended)** – I will approve or decline invoices in the portal.
- ☐ **Email** – I will approve invoices by replying to JPPM's email.
- ☐ **Pre-approved providers** – JPPM may pay invoices from providers I have agreed to without asking me each time. I will check my statements and report errors promptly.

Acknowledgements and consents (please tick)

- ☐ I have read and understood this agreement, or had it explained to me, and I agree to it.
- ☐ I understand I am responsible for making sure the supports I buy are NDIS supports, consistent with my plan and within my available funds (sections 6–8).
- ☐ I understand JPPM cannot pay invoices that exceed my available funding or that are claimed outside the NDIA time limit.
- ☐ I consent to JPPM sharing information as described in section 10.
- ☐ I consent to my support coordinator having read-only access to the Participant Portal (if applicable).
- ☐ I agree to receive documents, statements and notices electronically or by post.

Signature – participant / nominee / parent	
Full name	
Role / relationship to participant	
Date	

If someone signs for the participant, they must have the participant's consent or legal authority, and a copy of that authority should be sent to JPPM.