



VersatilePlanners

NDIS PLAN MANAGEMENT

Participant Service Agreement

Formal agreement for plan management services

Please read before signing

This is the formal Service Agreement between you and Versatile Planners. Read it together with the Participant Reading Handbook. The handbook uses the same section numbers (1.1–1.10) to explain these terms in plain language.

PLAN MANAGEMENT

Financial administration of your plan-managed NDIS funding.

YOUR CHOICE

You choose your providers and stay involved in decisions about your supports.

PRICING

Fees are set out in this agreement and must not exceed the applicable NDIS price limit.

Versatile Planners Pty Ltd

Organisation ID: 4053544752 | ABN: 17 682 857 058

Version 1.0 | September 2026

**Parties and agreement details**

COMPLETE THESE DETAILS BEFORE SIGNING

This Service Agreement is between Versatile Planners Pty Ltd (the Provider, “we/us”) and the NDIS participant named below (“you”). If an authorised representative or nominee signs or acts for you, references to “you” include that person where appropriate.

Provider details

Legal name	Versatile Planners Pty Ltd
Organisation ID	4053544752
ABN	17 682 857 058
Phone	0433 964 400
Email	info@versatileplanners.com.au
Address	11 Shaftesbury Drive, Epping VIC 3076

Participant details

Participant full name	
Date of birth	
NDIS number	
Phone	
Email	
Address	

NDIS plan start date		NDIS plan end/reassessment date	
Service Agreement start date		Service Agreement end date	
Preferred contact method	Email / Phone / SMS	Preferred communication format	Standard / Easy Read / Other

Participant representative / nominee (optional)

Name	
Relationship / authority	
Phone	
Email	
Address	

About your NDIS plan

This agreement applies to the plan-managed funding in your current NDIS plan. You do not need to attach your full NDIS plan to this agreement unless you choose to do so or information from it is reasonably required to provide the service.



Schedule of plan management services

SERVICE, PRICING AND INVOICE APPROVAL INSTRUCTIONS

Versatile Planners will provide plan management financial administration for the plan-managed budgets in your NDIS plan.

Support item	Support item number	Description	Price	Unit	Delivery
Plan Management	14_034_0127_8_3	Plan Management – Monthly Fee	\$104.45	Month	Email / Phone / Online

Pricing note: The monthly fee shown above is the current NDIS price limit at the date of this agreement. Versatile Planners will not charge more than the applicable NDIS price limit. If the NDIS changes the price limit during the term of this agreement, Versatile Planners may apply the updated price from its effective date after notifying you. No separate establishment fee is charged under the current NDIS pricing schedule.

What the monthly plan management service includes

- receiving and checking provider invoices and participant reimbursement requests
- checking available plan-managed funding and whether a claim can be submitted
- submitting valid claims through the relevant NDIS provider portal
- paying providers or reimbursing you after NDIS payment is received
- tracking spending and providing regular budget statements
- keeping financial records and helping resolve invoice or payment issues.

Role boundary

Plan management is a financial administration service. It is different from support coordination. Versatile Planners is not responsible for choosing providers for you or managing the delivery of your supports.

Your invoice approval instructions

Choose one option. Your selection is your agreed method of authorising claims. You can change this instruction later by contacting Versatile Planners in writing.

☐ Standing authorisation – I authorise Versatile Planners to process and claim valid provider invoices without asking me to approve each invoice individually, subject to the checks in this agreement.

☐ Approval required – Versatile Planners must obtain my approval before processing each invoice. Approval requests should be sent to: _____

☐ Service agreement based – Versatile Planners may process invoices that match an agreed provider service agreement or written schedule I have supplied. Any invoice outside that agreement must be referred to me for approval.

If no option is selected, Versatile Planners may request approval before processing invoices until an approval method is agreed.



1.1 How this agreement works with the NDIS

MATCHES HANDBOOK SECTION 1.1

This agreement is made for the purpose of providing plan management services for the plan-managed funding in your NDIS plan. It supports your choice and control and does not change your right to choose your providers or the supports you receive.

You remain responsible for using your NDIS funding for NDIS supports and within your available budget. Versatile Planners manages the financial administration of the funding you have chosen to have plan-managed.

1.2 What plan management includes

MATCHES HANDBOOK SECTION 1.2

- monitoring plan-managed budgets and spending information available to us
- receiving, checking and recording invoices and receipts
- checking claims against available funding and NDIS claiming requirements
- submitting valid claims and paying providers after NDIS payment is received
- providing regular financial statements and budget information
- responding to reasonable questions about invoices, payments and plan-managed budgets.

1.3 Our responsibilities

MATCHES HANDBOOK SECTION 1.3

Versatile Planners agrees to:

- provide plan management services professionally, respectfully and transparently
- communicate openly and respond to reasonable enquiries in a timely manner
- protect your privacy and confidential information and only use or disclose information as permitted by law and your consent
- keep accurate records of invoices, claims and payments
- provide regular budget statements and let you know where we identify a material risk of overspending
- explain when an invoice cannot be processed or a claim cannot be made, where relevant
- meet applicable NDIS, privacy and consumer law obligations.

1.4 Your responsibilities

MATCHES HANDBOOK SECTION 1.4

You, or your authorised representative, agree to:

- provide accurate and current contact, plan and funding information reasonably needed for plan management
- tell us promptly if your NDIS plan, funding management, nominee details or contact details change
- choose and manage your providers and tell us if a service was not delivered or an invoice is incorrect
- authorise claims using the approval method selected in this agreement
- make sure the supports you purchase are NDIS supports and are within your available funding
- monitor your spending and contact us if you have concerns about your budget
- treat Versatile Planners staff respectfully and raise concerns with us as soon as practicable.



1.5 Invoices, claims and payments

MATCHES HANDBOOK SECTION 1.5

Versatile Planners processes invoices and reimbursement requests for supports funded from your plan-managed NDIS budgets. Payment depends on a valid invoice or receipt, available funding, your agreed authorisation method and successful NDIS claiming.

Provider invoices

Providers should send invoices to Versatile Planners using the contact details we give you. An invoice should contain enough information for us to identify the provider, participant, support delivered, service date, quantity, rate and total amount.

We may place an invoice on hold or return it to the provider if information is missing, the invoice appears duplicated or incorrect, the support cannot be claimed, there is insufficient available funding, or we need your approval or further information.

Claims and provider payments

1. We receive the invoice or reimbursement request.
2. We check the invoice details, available plan-managed budget and relevant claiming requirements.
3. We obtain your authorisation in the way selected on page 3 of this agreement.
4. We submit a valid claim through the relevant NDIS provider portal.
5. After NDIS payment is received, we pay the provider or reimburse you, as applicable.

Payment timing

Versatile Planners is not required to pay a provider from its own funds before the NDIS pays an approved claim. Delays can occur if an invoice needs correction, approval, further information or review by the NDIS.

Participant reimbursements

If you have personally paid for an NDIS support from a plan-managed budget, you may ask us to submit a reimbursement claim. You must provide a valid receipt or other reasonable evidence of payment. Reimbursement can only be made if the claim is valid and the NDIS pays the claim.

Budget monitoring and statements

We will provide regular information about your plan-managed spending and remaining budget based on information available to us. Budget figures may change when claims are pending, adjusted or processed by the NDIS. Our budget monitoring does not replace your responsibility to keep track of your funding and avoid overspending.

Fees and GST

The plan management fee is charged from the NDIS funding allocated for plan management. Prices shown in this agreement are GST inclusive where GST applies. NDIS-funded supports may be GST-free when the legal requirements are met.



1.6 Changes to your service

MATCHES HANDBOOK SECTION 1.6

If your plan, funding, contact details, invoice approval instructions or other information relevant to plan management changes, please tell us as soon as possible. We will discuss any material change to this agreement with you. Changes to the formal terms of this agreement should be recorded in writing where required.

1.7 Ending plan management

MATCHES HANDBOOK SECTION 1.7

You can choose to change or stop using Versatile Planners as your plan manager. Where practicable, please give 28 days' notice so outstanding invoices and records can be handed over properly. A shorter period can be agreed where appropriate.

If Versatile Planners decides to end the plan management relationship, we will give you at least 28 days' notice and continue meeting our obligations during the notice period, unless immediate action is required because of a serious breach, unlawful conduct, safety risk or another circumstance where continuing the relationship is not reasonably possible.

When the relationship ends, we will reasonably assist with the handover of relevant records and outstanding invoices to your new plan manager where required and authorised.

1.8 Feedback, complaints and disputes

MATCHES HANDBOOK SECTION 1.8

You can give feedback or make a complaint without affecting your right to receive respectful service.

- Versatile Planners: Mohammed Ahmar Siddiqui – 0433 964 400 – info@versatileplanners.com.au – 11 Shaftesbury Drive, Epping VIC 3076 (Monday to Friday, 9:00 am to 5:00 pm).
- NDIS Quality and Safeguards Commission: 1800 035 544 or [ndiscommission.gov.au/complaints](https://www.ndiscommission.gov.au/complaints) for concerns about the quality or safety of NDIS supports or services.
- National Disability Insurance Agency (NDIA): 1800 800 110 or [ndis.gov.au](https://www.ndis.gov.au) for issues about your NDIS plan, funding, NDIS decisions, portals or the NDIS system.

1.9 Advocacy and support

MATCHES HANDBOOK SECTION 1.9

You may ask a family member, friend, nominee, advocate or other support person to assist you or attend meetings. We may need your consent or evidence of authority before sharing your personal information with another person. We can provide information about independent advocacy options if requested.

1.10 Emergencies and service continuity

MATCHES HANDBOOK SECTION 1.10

Plan management is not an emergency or clinical service. If someone is in immediate danger or there is a life-threatening emergency, call 000.

Versatile Planners maintains business continuity procedures for disruptions that affect our service. We will take reasonable steps to protect records, maintain essential plan management functions and communicate with affected participants and providers where possible.



Consent, declaration and signatures

PLEASE READ CAREFULLY BEFORE SIGNING

Privacy and information sharing consent

To provide plan management, Versatile Planners needs to collect, use and disclose information that is reasonably necessary to process invoices, submit claims, pay providers, maintain records and meet legal or regulatory obligations.

By signing this agreement, you consent to Versatile Planners sharing relevant information, where reasonably necessary, with:

- the NDIA and relevant NDIS provider portals
- providers whose invoices or payments we are processing
- your authorised representative, nominee or support person
- government agencies, regulators or other parties where disclosure is required or permitted by law
- other people or organisations you separately authorise.

We will not intentionally disclose more information than is reasonably necessary for the purpose. You can withdraw or change a consent that is not required by law, but this may affect our ability to provide some plan management functions.

Participant declaration

By signing, I confirm that:

- I have read this Service Agreement, or it has been explained to me in a way I understand.
- I have received or been offered the Versatile Planners Participant Reading Handbook.
- I understand the scope of plan management and the respective responsibilities of Versatile Planners and me.
- I understand the plan management fee and that it may be adjusted in line with an updated NDIS price limit after I am notified.
- I have selected, or will agree with Versatile Planners, how invoices and claims are to be authorised.
- I understand how to provide feedback, make a complaint, change plan managers or end this agreement.
- The information I have provided in this agreement is accurate to the best of my knowledge.

Agreement priority

The Participant Reading Handbook is an explanatory guide. If there is any inconsistency between the handbook and this signed Service Agreement, this Service Agreement applies.

Participant / authorised representative

Full name	
Capacity	Participant / Representative / Nominee
Signature	
Date	

For Versatile Planners

Name	
Position	
Signature	
Date	

Keep a copy of the signed agreement for your records. Contact Versatile Planners if you need this agreement in another accessible format or need any part explained.