

NDIS Plan Management Service Agreement

Sample of the 17-section agreement generated by ClientForms, completed for a fictional practice. The fees, notice period and wording are the practice's own choices — every section can be edited, reordered or removed.
clientforms.app/au/ndis-service-agreement-template

Who this agreement is between

This agreement is between you, the participant, and Saltbush Plan Management.

ABN 12 345 678 901

NDIS provider number 4050001234

Email hello@saltbushplans.com.au

Phone (07) 3555 0192

If you would like a copy of this agreement, ask us and we will send you one.

How long this agreement runs

This agreement starts on the day it is signed and runs while Saltbush Plan Management manages the funding in your NDIS plan.

Either of us can end it by giving 14 days notice in writing. You can change plan managers at any time, as long as the notice agreed here is given.

What we do

Saltbush Plan Management is your plan manager. We look after the financial administration of the supports that are plan managed in your NDIS plan.

That means we:

- receive invoices from your providers and pay them
- process reimbursements when you have paid for a support yourself
- claim those payments from the NDIA
- keep track of what has been spent and what is left in each support category

We do not choose your providers or decide what supports you receive. Those are your decisions.

Our fees

The NDIA funds plan management separately from your other supports, in its own budget. Our fees come out of that budget, not out of the funding for your other supports, and not out of your own pocket.

We charge:

- a one-off establishment fee, when plan management is first set up
- a monthly fee, for as long as we manage your plan

Our fees are within the price limits in the NDIS Pricing Arrangements and Price Limits that apply at the time. If those limits change, our fees may change with them, and we will tell you.

How invoices are handled

Your providers send their invoices to us at hello@saltbushplans.com.au. If you have paid for a support yourself, send us the receipt and we will process the reimbursement.

We check each invoice against your plan and the NDIS price limits before we pay it. We aim to pay valid invoices promptly once the NDIA has released the funds.

If an invoice does not look right, we will contact you before paying it.

Approving invoices

Before we start paying providers on your behalf, we need to know how much you want to be asked.

☐ Check with me before paying any invoice

☒ Pay invoices from my regular providers without checking, and check with me for anyone else

You can change this at any time by telling us.

Seeing your invoices

How much you want to see is up to you.

☒ Send me a copy of every invoice

☐ Only tell me about invoices you have a question about

Whatever you choose, you can ask to see any invoice at any time.

Statements

We send you a statement each month showing what has been paid and what is left in each support category.

If your spending looks like it will run out before the plan does, or if a large part of the plan is still unspent as the end date approaches, we will tell you so there is time to do something about it.

Talking to you

We contact you the way you asked us to when you registered. You can change that at any time.

If you need information in a particular format, or you would like an interpreter, tell us and we will arrange it. That includes Easy Read, large print, and interpreting in your language or in Auslan.

Your NDIS plan information

To manage your funding we need to see your current plan, including the amount in each support category.

You give us that access by recording Saltbush Plan Management as one of your providers in your my NDIS account. Once you have, we can see the plan and budget information we need in the my NDIS provider portal. You can also send us a copy of your plan directly.

We use that information only to manage your plan. If your plan changes, is reassessed, extended or suspended, please tell us as soon as you can.

If someone acts for you

If you have told us that someone acts on your behalf, we can deal with that person on the matters covered by this agreement, in the role you have told us they hold.

Tell us if that changes.

If something goes wrong

If you are unhappy with anything we do, tell us. You can reach us at hello@saltbushplans.com.au or on (07) 3555 0192. We will acknowledge it, look into it, and tell you what we find.

You do not have to come to us first. You can contact the NDIS Quality and Safeguards Commission on 1800 035 544, or make a complaint at [ndiscommission.gov.au](https://www.ndiscommission.gov.au).

Conflicts of interest

We tell you if we have any interest in a provider we might pay on your behalf, so you can decide what to do with that information.

We do not require you to use any particular provider, and choosing us as your plan manager does not oblige you to use any other service we or anyone connected to us offers.

Changing or ending this agreement

You can change plan managers at any time, giving the notice agreed above.

When this agreement ends we pay any invoices that were properly incurred while we were managing the plan, and we send you a final statement showing what was paid and what is left in each support category. If your new plan manager needs information from us to take over, we will provide it.

How we give each other notice

Anything either of us has to put in writing under this agreement can be sent by email. Ours goes to the address you gave us when you registered. Yours goes to hello@saltbushplans.com.au.

Your terms

(Left empty by Saltbush Plan Management. This section is where a practice's own wording goes — ClientForms writes none of it.)

Your agreement

By signing below, I confirm that:

- I have read this agreement, or had it read to me, and I understand it
- I have had the chance to ask questions and have them answered
- I agree to Saltbush Plan Management managing the funding in my NDIS plan on these terms
- I understand I can end this agreement by giving the notice set out above

If you are signing on someone else's behalf, please give your name and the role you hold.

Rosemary Brennan

Signed by Rosemary Brennan, plan nominee, for Talia Brennan · 18 August 2026

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