

ALLIANZ NDIS PLAN MANAGEMENT

# Your Participant Handbook



# Welcome to Allianz NDIS Plan Management

As a registered NDIS provider of plan management services, we're here to manage the funding of supports and services under your NDIS approved plan.

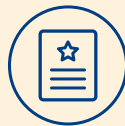
If you choose us as your Plan Manager, we'll work with you to help manage your NDIS budget under your plan in a way that meets your needs. This helps you get on with life and focus on achieving your goals.

## Why Choose Us?



### Your own Plan Manager

We give you personalised service through your own dedicated Plan Manager working with you to help achieve your goals.



### Trusted expertise

We're one of Australia's largest general insurers with trusted expertise in personal injury and disability management so you can feel confident with our service.



### Helping Australians for over a century

We have over 100 years' experience supporting Australians who have faced an injury or live with disability.



### Simple plan management

We aim to pay invoices for NDIS approved services and supports within 2 business days of receiving them, helping remove the hassle for you.



### Quick and easy self-service

Our accessible online portal helps track your spend and receive real-time updates.



### We care and act with empathy

Our highly trained teams specialise in supporting people with disability, communicating clearly and sensitively.



### Plan Management at no cost

All Plan Manager fees are covered by NDIS.



### National presence

We have a national footprint with a presence in every Australian state and territory.



### Access one of the largest provider networks

We can provide you details for many service providers across Australia supporting you in having greater choice.



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## What you can expect from Allianz as your Plan Manager

**As your Plan Manager, we're here to help you become more confident at managing your NDIS funding for supports.**

**We'll work with you to understand the funds available within your plan.**

We can help you decide how to spend these funds and comply with your NDIS plan and the Scheme. Our team will also help you to know your rights as a NDIS participant.

### **We will:**

- Help you navigate the Scheme in a way that respects your rights as a NDIS participant.
- Support you to make informed choices that maximise your independence.

Our services to you will be outlined in our proposed Agreement document. You'll receive this from your Allianz Plan Manager when you indicate you'd like to consider using Allianz as your Plan Manager. You will have a right to negotiate the terms of this agreement with Allianz.

### **Where you enter into an Agreement with us, your dedicated Allianz Plan Manager will:**

- Advise you whether a support is covered by your NDIS plan funding.
- Manage your NDIS funding, including invoices and reimbursements
- Ensure that NDIS funds are spent in accordance with your NDIS plan and NDIS requirements.
- Pay your providers for NDIS plan approved supports.
- Help you keep track of payments from your NDIS plan funds and provide monthly statements.
- Complete all required NDIS financial reporting that's relevant to your plan.



## Additionally, we will:

- Communicate with you openly, honestly, and promptly, with respect and courtesy.
- Listen to your feedback and complaints and address any issues promptly.
- Keep your personal information confidential, subject to necessary and appropriate disclosures.
- Implement policies and procedures in line with the NDIS, to improve the service you receive from us.
- Follow NDIS legal requirements and guidelines in relation to our role as a Plan Manager.

## What we'll expect from you

If you choose us as your Plan Manager, you'll have certain responsibilities too. These will be listed in full in the final Agreement between you and Allianz.

### These responsibilities will include:

- Giving us a copy of your NDIS plan or participant number, and details of any changes to your plan (including if it's suspended or replaced.)
- Promptly letting us know of any change to your address or contact details, to make sure we can always communicate with you.
- Responding promptly to fair requests for information that will help us provide you with services.





## Money matters

### What is the cost?

Our services will be free to you. That means they don't impact your NDIS plan funding, as designated by the NDIS.

Instead, we'll claim directly from the NDIS a set-up fee (if applicable), and a monthly fee for the provision of services, as set out in the NDIS Price Guide.

You can take a look at the NDIS pricing arrangement and price limits on the NDIS website here: [www.ndis.gov.au/providers/pricing-arrangements](http://www.ndis.gov.au/providers/pricing-arrangements).

### How do payments work?

We'll deal with payments under your NDIS plan, so you can focus on simply living life.

Following validation of invoices, we'll aim to pay them for NDIS approved supports within 2 business days of getting them.

We use a central claim payments platform for participants, their representatives, and providers. It's designed to deliver straightforward, fast invoicing, claiming and payment services.

## What if you want to cancel?

You have the right to stop using us as your Plan Manager at any time. You simply need to give us 28 days' notice in writing of your decision to cancel the Agreement.

Before you cancel, though, we're always keen to discuss any issues you might be having with our services and work together to find an option that meets your needs better.





## Agreement with you

The document entitled '*Your Details and the Agreement*' (which will be provided by us to you should you wish to consider using Allianz as a Plan Manager) contains sections entitled:

**A. Your Details**

**B. Introduction to Agreement**

**C. Agreement**

Please read these sections carefully.

## Your details

Should you wish to use Allianz as your NDIS Plan Manager, you will need to fill in the '*Your Details*' section.

## The Agreement

The Agreement contains draft terms which we will discuss with you. Some of these draft terms provide options and you can choose the option or options that meet your needs. You can also request changes to any of the terms in the Agreement.

If the terms are agreed between you and Allianz, the document will be finalised as an Agreement, and once signed will form the terms of our Agreement with you.

It is important that both you and Allianz are clear on the arrangement between us and that is why there should be a written agreement. This should minimise misunderstandings that can often arise when there's no written agreement.

# Privacy

We take your privacy seriously. If you choose us as a Plan Manager we will collect, use, store and disclose your personal information in accordance with our privacy policy. For more details, refer to the Agreement we will send you and our privacy policy, available online via this link:

[www.allianz.com.au/NDIS](http://www.allianz.com.au/NDIS)

## To request your personal information or report a privacy concern in writing to us:

**Mail:** Level 16, 10 Carrington Street, Sydney, NSW 2000

**Email:** [ndis@allianz.com.au](mailto:ndis@allianz.com.au)

## If you are dissatisfied with the response, contact the Office of the Australian Information Commissioner (OAIC) via:

**Mail:** GPO Box 5218, Sydney NSW 2001

**Email:** [enquiries@oaic.gov.au](mailto:enquiries@oaic.gov.au)

**Online:** [www.oaic.gov.au](http://www.oaic.gov.au)

# Feedback

Your feedback helps us give you high-quality services, so if you choose us as your Plan Manager let us know how we're doing. Feedback can be anonymous, via written or online surveys – or just have a conversation with a team member.

Remember, you always have the right to expect the best possible standard of service from us.

# Complaints

We'll always treat any concern or complaint as a serious issue. If you don't feel comfortable making a complaint, you can do so anonymously via our website at [www.allianz.com.au/NDIS](http://www.allianz.com.au/NDIS) or call us on 13 NDIS (13 63 47).

Once we've received a complaint, we'll investigate and try to do our best to resolve it. Throughout the process, we'll keep you informed. For more details about how we deal with complaints, please refer to the proposed Agreement.

## Contact us

**Phone: 13 NDIS (13 63 47)\***

**Email: [ndis@allianz.com.au](mailto:ndis@allianz.com.au)**

**Website: [allianz.com.au/NDIS](http://allianz.com.au/NDIS)**

**Address: Level 16, 10 Carrington St, Sydney NSW 2000**

\*Customer Service Team available during business days Monday – Friday between 8.00 AM – 7.00 PM AEST.



**Allianz Australia Insurance Limited** (ABN 15 000 122 850)  
is a registered Plan Manager (Registration ID 4-GKXR5J)  
and is authorised to manage the funding for supports under  
participant's plans as defined under section 42 of the NDIS Act.