

## PRIVACY AND DIGNITY POLICY

**1. Purpose** This Policy outlines how Disability Care Pty Ltd (Trading as My Plan Advisor) (“My Plan Advisor”, “MPA”, “we”, “our”, “us”) collects, uses, stores and discloses Personal Information in accordance with the Privacy Act 1988 (Cth) and the Australian Privacy Principles (APPs).

It also explains your rights to privacy and dignity in relation to your information, and how you can contact us or lodge a complaint about how your personal data is handled.

### 2. Policy Statement

MyPlan Advisor is committed to upholding each participant’s legal and human rights by ensuring that all services delivered under our Plan Management scope respect privacy, dignity, and confidentiality always.

We will:

- Respect your privacy and dignity in every interaction and in the delivery of plan management supports.
- Ensure you clearly understand what Personal Information we collect and why.
- Explain how we securely manage, store, and disclose Personal Information in line with our obligations as a NDIS Plan Manager.
- Work collaboratively with your authorised representative or guardian, where applicable, to protect your well-being and ensure decisions are made in your best interests.

**3. Policy Overview** By providing your Personal Information to us (including through My Plan Advisor platforms such as the client portal or mobile app), you consent to the collection, use and disclosure of that information in accordance with this Policy.

This Policy may be updated periodically, and the latest version will be published on our website and client portal. Participants and their representatives are encouraged to review it regularly.

This Policy should be read together with any consent forms or collection notices issued by My Plan Advisor.

### 4. Collection of Personal Information

We collect Personal Information only to the extent necessary to deliver our Plan Management services effectively.

This may include:

- Name, date of birth, address, email and contact numbers.
- NDIS plan details and participant number.
- Preferred communication method.
- Bank account details (for reimbursement claims).
- Consent to obtain and release information forms.

- Uploaded documents, invoices, service booking information and correspondence.
- Notes or interactions through the client portal or mobile app.
- Audio recordings collected with your consent for quality assurance and training.

We will not collect any information that is not reasonably required for the provision of Plan Management services.

## 5. Collection of Sensitive Information

In delivering Plan Management, we may collect limited sensitive information, including:

- Information about your disability, health condition, or service goals contained in your NDIS plan.
- Information provided by your authorised representative, support coordinator, or service provider.

Sensitive information is collected only:

- With your consent (or your authorised representative's consent); or
- Where required or permitted by law.

## 6. How We Collect and Hold Information

Personal Information may be collected directly from you, your authorised representative, or the National Disability Insurance Agency (NDIA) when you:

- Register for Plan Management services.
- Communicate with us by phone, email, portal, or in person.
- Authorise us to process invoices on your behalf.
- Provide consent for us to liaise with the NDIA or other providers.

In limited cases, we may collect information indirectly from third parties (e.g. support coordinators or providers) where it is unreasonable or impractical to collect it directly from you. We will notify you as soon as practicable when this occurs.

All information is stored securely in Australia on encrypted systems.

## 7. Purpose of Collection and Use

Personal Information is collected and used solely to fulfil our obligations as a NDIS Plan Manager, including:

- Processing and paying invoices.
- Communicating about your plan funding and budget status.
- Managing reimbursements and provider payments.
- Responding to enquiries and providing plan support.
- Complying with NDIA requirements and the NDIS Code of Conduct.
- Conducting internal reviews, audits, and service quality improvements.
- Managing our client portal and mobile application.

## 8. Failure to Provide Information

You may choose not to provide certain information; however, this may affect our ability to deliver Plan Management services or process claims on your behalf. We will explain any potential impacts if information is withheld.

## 10. Disclosure of Personal Information

My Plan Advisor may disclose Personal Information:

- To related entities or trusted contractors who assist in service delivery (e.g. IT support, accounting software providers).
- To the NDIA or government agencies as required by law.
- To your authorised representative or nominated provider where you have given consent.

Some third-party service providers may operate outside Australia (including in New Zealand, India, the Philippines, and the USA). When we transfer data overseas, we take reasonable steps to ensure that these parties comply with Australian privacy requirements.

We will not disclose any information to third parties without your written consent unless legally required.

## 11. Security of Personal Information

All Personal Information is stored electronically in secure, access-controlled environments. My Plan Advisor uses encryption, firewalls, and password-protected systems to prevent unauthorised access, modification, or disclosure.

Information is retained for as long as necessary to meet legal and NDIA requirements and securely destroyed or archived once no longer required.

## 12. Access to and Correction of Information

You have the right to request access to your Personal Information held by My Plan Advisor. Requests must be made in writing to our Privacy Officer.

If any of your information is inaccurate or outdated, you may request a correction. Where we decline a correction request, we will notify you in writing and explain your right to lodge a complaint.

## 13. Marketing Communication

We may occasionally send information about our services or resources relevant to your NDIS plan. You may opt out of receiving such communications at any time by emailing [info@myplanadvisor.org](mailto:info@myplanadvisor.org)

## 14. Links to Other Websites

Our website or client portal may contain links to external websites. My Plan Advisor is not responsible for the privacy practices or content of those third-party sites and encourages users to review their privacy policies before providing any information.

## 15. Feedback and Complaints

My Plan Advisor welcomes feedback and takes privacy concerns seriously.

To make a privacy complaint or provide feedback:

- Email: [info@myplanadvisor.org](mailto:info@myplanadvisor.org)
- Post: Admin Officer, Disability Care Pty Ltd (T/A My Plan Advisor), Unit 202, Portal Office Park, 2994 Logan Rd, Underwood QLD 4119

Allcomplaints will be handled confidentially and responded to within a reasonable timeframe.

If you remain dissatisfied, you may contact the Office of the Australian Information Commissioner (OAIC) at 1300 363 992 or via [www.oaic.gov.au](http://www.oaic.gov.au).

## 16. Glossary of Terms

*Australian Privacy Principles (APPs)*- Principles under the Privacy Act 1988 (Cth) governing how organisations manage personal information.

*Client / Participant* - An NDIS participant receiving Plan Management services from My Plan Advisor.

*Personal Information* - Information or an opinion that identifies or could identify an individual, whether true or not, and whether recorded in a material form or not.

*Sensitive Information* - Information about a person's health, disability, racial or ethnic origin, or other details defined in the Privacy Act 1988 (Cth).

*Authorised Representative* - A person legally appointed to act or make decisions on behalf of the participant.

*Platforms* - Any My Plan Advisor technology system, including the client portal and mobile application.

Policy A statement outlining the intent and approach of My Plan Advisor in protecting client privacy and dignity.

## 17. Review and Approval

This Policy will be reviewed annually, or sooner if legislative or organisational changes occur, to ensure ongoing compliance with the Privacy Act 1988 (Cth) and NDIS requirements.