

Privacy Policy

Plan Management Partners Pty Ltd



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Privacy Policy

Plan Management Partners Pty Ltd (**PMP**) is committed to protecting the privacy and the rights of individuals with whom it deals. This policy sets out how we collect and manage personal and sensitive information about those individuals and contains our privacy collection statement.

1. What is personal information?

Personal information is defined in the *Privacy Act 1988* (Cth). Generally, it is information or an opinion from which your identity is apparent or can be reasonably ascertained. This may include your name, address, telephone number, email address, profession or occupation.

2. Types of personal information we collect

The types of personal information we may collect include:

- name;
- address (residential and mailing address);
- contact details (telephone number, fax number and email address);
- age and date of birth;
- employment details and financial information (your salary and the name and address of your employer);
- profession, occupation and job title; and
- employee number.

We may also collect the following information depending on the products and services we provide you:

- credit card details;
- bank account numbers;
- details of income, assets, liabilities, expenses, credit history, credit worthiness; and
- other information as required by the *Anti-Money Laundering Counter-Terrorism Financing Act 2006* (Cth).

Generally we do not collect sensitive information about you. Sensitive information includes your:

- racial or ethnic background;
- political opinions;
- membership of political;
- professional or trade associations or trade unions;
- religious beliefs or affiliations;
- philosophical beliefs;
- sexual preferences or practices;
- criminal record; and
- health information.

However, we may have to collect such sensitive information with your prior consent if the information is required to provide you with a specific product or service or where required by law. If we collect sensitive information from a third party, we will also obtain your prior consent.

When you visit our websites, we may collect statistics on the number, date and time of your visit, the number of pages viewed and the manner in which you navigate through our sites.

When you call us, we may collect statistics on the number, date and time of your call and the manner in which you navigated through our telephony system. We may also monitor and/or record in-coming and out-going telephone calls for taxation, verification, substantiation and quality assurance purposes.

3. Why we collect your personal and sensitive information

We collect your personal and sensitive information to perform our business activities and functions. We collect, hold, use and disclose such information to provide you with plan management services you have requested (including the administration of your NDIS funds, co-ordination of your disability supports and liaising with your support providers and with the NDIA) and to comply with any law, rule or regulation or request or direction from any regulator, government authority or a court/tribunal.

We may also collect, hold, use and disclose your information for the following purposes:

Personal Information:

- conduct our business administration and operations (such as accounting, risk management, record keeping, statistical analysis, research, planning, systems development, testing and staff training);
- conduct our marketing (including direct marketing), planning, new product or service development, quality control and research;
- conduct customer satisfaction surveys / Net Promoter Score;
- send you material about other products and services offered by us; and
- assess and monitor the use and performance of our websites and provide you with access to secure areas of our websites.

Sensitive information:

- with your prior consent, conduct our marketing (including direct marketing), planning, new product or service development, quality control and research and send you material about other products and services offered by us.

We may share personal information about you with our related bodies corporate, contractors and service providers for any of the purposes outlined above. We will not share sensitive information about you with any person unless you have provided us with your prior consent.

4. How we collect your personal and sensitive information

Where it is reasonable and practical to do so, we will always collect personal and sensitive information directly from you. How we collect your personal information will depend on how you interact with us. For example, we may collect it through your access and use of our websites, during your conversations with our representatives or from application forms you complete.

There are occasions when we may need to collect your personal information from third parties, with or without your direct involvement but we will obtain your prior consent if we may need to obtain your sensitive information from third parties. Depending on the products or services you request or receive, the third parties from whom we may collect personal information include your employer, market research organisations, third party brokers and agents, government agencies, your representatives and your advisers and other organisations who, jointly with us, provide products or services to you. Sensitive information from whom we may collect include your medical practitioner, health and disability support providers.

5. Disclosing your personal and sensitive information

We may disclose your personal and sensitive information to another person, such as:

- your employer;
- our employees and related bodies corporate;
- our agents, contractors and service providers, including web hosting providers, IT systems administrators, disability support providers and consultants;
- regulatory bodies, government agencies and law enforcement bodies, including the Department of Human Services and the NDIA;
- financial institutions and payment systems operators, in relation to the processing, administration and management of services requested by you;
- persons acting on your behalf, including your legal adviser, financial adviser, executor, administrator, trustee, guardian or attorney;
- other organisations or firms, who jointly with us, provide products or services to you;
- State and Territory road authorities in relation to motor vehicle registration and compulsory third party insurance;

In the unlikely event that the assets and operations of our business are sold to another party, our records of personal and sensitive information will be transferred to that party.

6. What if we can't collect your personal information?

If you do not provide us with the personal or sensitive information described above, some or all of the following may happen:

- we may be unable to provide the requested products or services to you, either to the same standard or at all;
- we may be unable to provide you with information about products and services you may want, ; or

- we may be unable to tailor the content of our websites to your preferences and your experience of our websites may not be as enjoyable or useful.

7. Marketing our products and services to you

We may use your information to offer you products or services we believe may be of interest to you. We may contact you by telephone, mail, SMS, fax or email. You can notify us at any time if you no longer wish to receive marketing communications from us. Our contact details are set out at the end of this policy. We do not sell personal or sensitive information to other organisations to allow them to do this.

8. Protection of your personal information

We take reasonable steps to ensure your personal and sensitive information is protected from misuse and loss and from unauthorised access, modification or disclosure. We may hold your information in either electronic or hard copy form. Personal and sensitive information is destroyed or de-identified when no longer needed.

When browsing our web sites, you acknowledge that the internet is not always a secure environment and that the computer and network you use contribute to the overall level of effective protection in place. You further acknowledge that any transmission of information over the internet is out of our control before it reaches our system. Only once we receive your transmission, we can take reasonable steps to ensure its security.

In order to protect your information online, we ask that you observe the security requirements relating to the protection of your user identification number and/or password used to access your online account. We recommend that you:

- change your password on initial access to our website;
- ensure the user identification number given to you is kept securely;
- destroy any documentation (including any email) we issue containing your password;
- memorise your user identification number and password;
- do not tell anyone of your user identification number and password;
- immediately telephone us if you suspect your online account or related email account has been breached.

9. Links

Our websites may contain hyperlinks to other sites maintained by different organisations. We do not claim any association with websites which are not clearly identified as our own and do not take any responsibility for their content. Hyperlink users should observe such websites' terms of use, privacy policies and copyright, which may or may not comply with the same privacy standards that we do.

10. Access to your information

You may request access to any personal or sensitive information we hold about you. The type of information you request will determine the length of time we take to respond. We will generally respond using the same communication method by which your request was originally made.

On occasion we will ask that you put your request in writing. This may include instances where you want copies of material or access to archived information or if the nature of your application makes it necessary for us to retain a record of your request.

You may be able to access some personal and sensitive information via our customer service portal which is provided by a third party web hosting provider. Access to personal and sensitive information via this portal requires the use of your unique user identification number and password. No personal or sensitive information is openly posted on the Internet. If you have difficulty finding the information you want or in using the website, please contact us.

In some circumstances, we may charge an administration fee to retrieve your information, based on our reasonable costs in providing the information to you. If we intend to charge an administration fee we will give you an estimate of this fee so you can confirm you still want us to proceed with your request. We do not impose any charge for submitting a request for access.

We are entitled to refuse you access to your information in certain circumstances. For example, you may not be able to access information that would reveal information about another person, is commercially sensitive material or we are prevented by law from disclosing. If this happens, we will provide you with a reason for the refusal.

11. What if the information is incorrect?

If you believe that personal or sensitive information we hold about you is incorrect, incomplete or inaccurate, then you may request that we amend it. We will generally correct the information upon request (or suggest alternative arrangements for updating our records). If we do not agree that the information should be corrected, we will provide you with a response stating the reasons.

12. Cookies

We may collect personal information about you through the use of cookies. When you access our website, we may send a “cookie” (which is a small summary file containing a unique ID number) to your computer. This enables us to recognise your computer and greet you each time you visit our website without bothering you with a request to register. It also enables us to keep track of products or services you view so that we can send you news about those products or services. We also use cookies to measure traffic patterns, to determine which areas of our website have been visited and to measure transaction patterns in the aggregate. We use this to research our users’ habits so that we can improve our online products and services. Our cookies do not collect personal information. If you do not wish to receive cookies, you can set your browser so that your computer does not accept them.

We may log IP addresses (that is, the electronic addresses of computers connected to the internet) to analyse trends, administer the website, track users movements, and gather broad demographic information.

13. Do we disclose your personal information to anyone outside Australia?

In order to provide our services to our customers we may engage other Service Providers to perform certain functions. These functions may involve the hosting or accessing of personal information by the Service Provider outside Australia.

14. Complaints

If you have any questions regarding this policy or any concerns regarding our treatment of your personal information, we invite you to contact us. Contact details are set out below.

We will aim to answer your questions or concerns in a timely and satisfactory manner. If we cannot resolve the matter at the point of first contact, a representative will be in contact within a reasonable time to advise:

- who will be handling your enquiry; and
- how our investigations are progressing.

Our contact details are:

All customers:

Email: privacy@mmsg.com.au

Mail: The Privacy Officer
Plan Management Partners
Locked Bag 18, Collins Street East
Melbourne 8003
VIC, Australia

Phone: 1300 333 700

Facsimile: 1300 733 444

Facsimile: 1300 733 444

15. Changes to this policy

We reserve the right to change this Privacy Policy from time to time by posting an updated version on this website.