



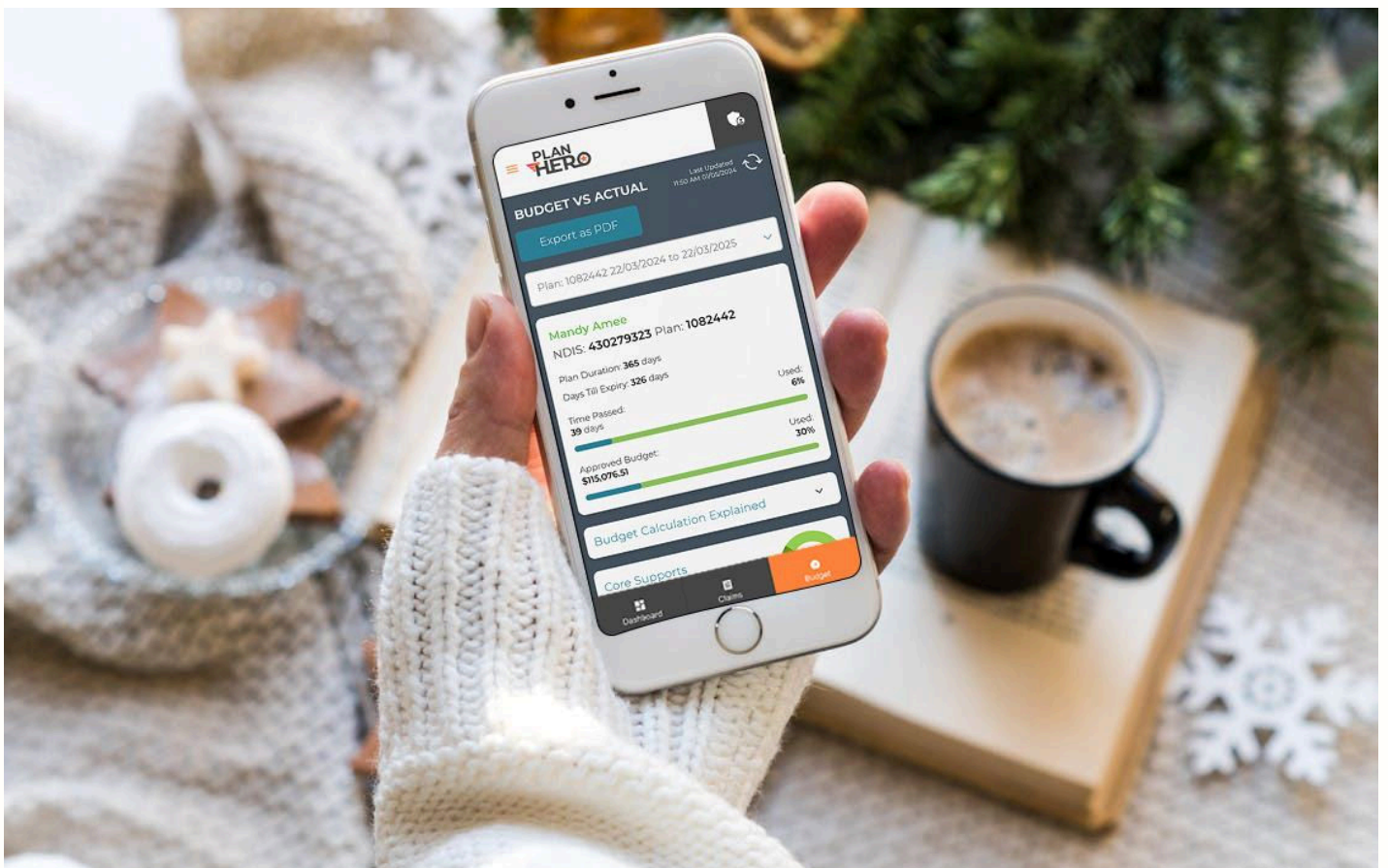
Plan Hero for Parents and Carers

We are a specialist, independent, boutique Plan Manager.

With extensive NDIS knowledge and experience, we ensure Participants understand what they can and can't spend their NDIS funding on.

We are independent. Plan Management is all we do and we are really good at it.

We are small. You won't be one of thousands and you will have your own Plan Manager who gets to know you and your family.



5 reasons why Plan Hero is the BEST Plan Manager for Parents

- 1. We are NDIS experts** – we always look for a way to approve the supports your child needs. Our first response is never 'No'.
- 2. You have a dedicated Plan Manager** – you only need to talk to one person who gets to know you and your child well.
- 3. We have an easy to use Online Portal and Phone App** – it's easy to use and shows you live funding levels, goals, your claims and we store your service agreements.
- 4. We can help you find other services** – we have a team of NDIS Navigators ready to search for and connect you with the supports you need.
- 5. Our reporting is visual and easy to understand** – we will also make sure you know if there is under or over spending.



How to sign up

1. **Give us a call** – we can sign you up over the phone, no problem!
2. **Register on our website** – click on the sign up button and we will be in touch.
3. **Tell the NDIS you want Plan Hero to be your plan manager** – you will need to give them this info:

Plan Hero Pty Ltd
Provider#: 4050079575
ABN: 43 641 197 659

What happens after sign up

1. **We give you a call** – your new Plan Manager will introduce themselves and get to know you.
2. **We 'Unpack Your Plan'** – we go through your plan and answer any questions you have.
3. **We are here to support you at any time** – we are just a phone call or email away!



What our clients say about us:



You are the only Plan managers that actually call me back



Your team goes above and beyond to help us and we love how smooth your process is



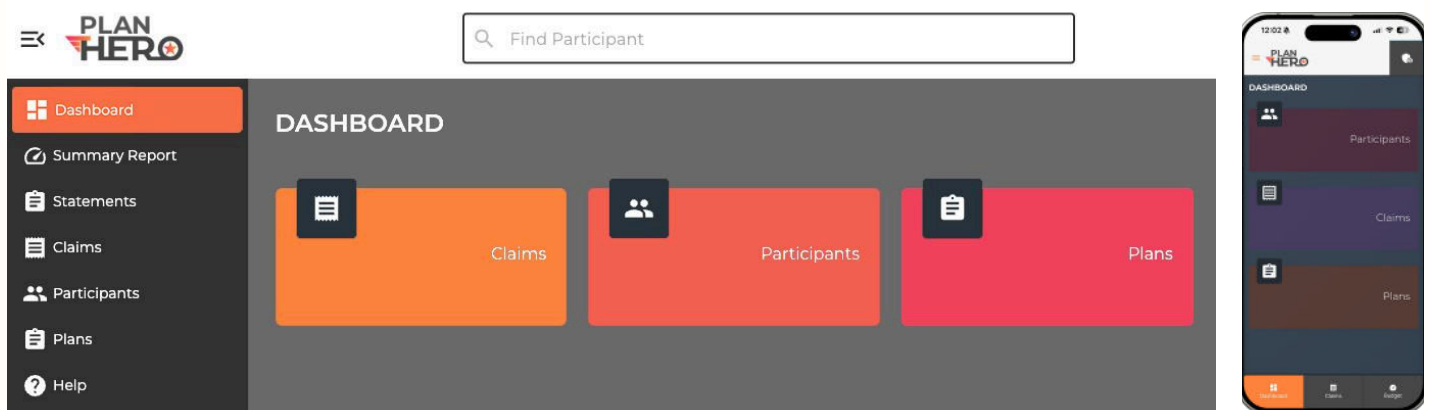
Your portal is easy to navigate for Participants and SC's



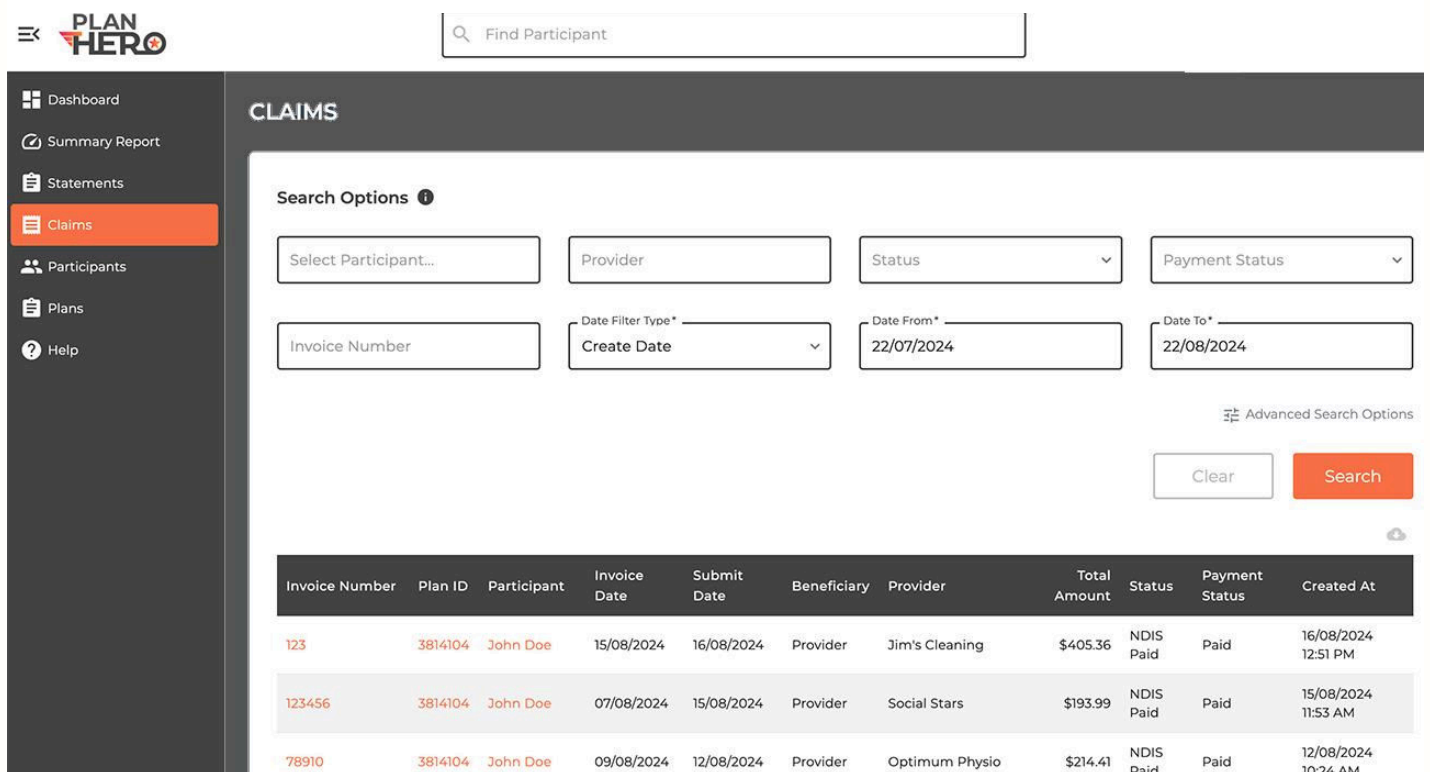
It's clear you have expert NDIS knowledge based on the support we are given with complex claims/situations

Samples of our the Plan Hero Online Portal and App

Easy Access to 24/7 live data



You have you own login and arrive at your dashboard.



You manage all your Participants from one place

Easy visual way to keep track of spending throughout the plan

John Doe, (20/11/2010, 13 years) NDIS 123456789 (Plan 123456 from 28/07/2022 to 27/07/2025)

Plan Duration: **1096** days


Time Passed: **756** days

Progress: **69%**

Days till Expiry: **341** days

Total Budget: **\$76,324.74**

Used: **36%**



[Back to Dashboard](#)

John Doe
 State: VIC
 NDIS #: 123456789
 DOB: 20/11/2010 (13 years)
 Price Zone: VIC - Non-Remote
 Plan: 123456
 28/07/2022 - 27/07/2025

Switch Plan

Plan Summary

[NDIS Budget](#)
[Budget Forecast](#)
[NDIS Goals](#)
[Statements](#)
[Participant Profile](#)
[Claims](#)
[Help](#)

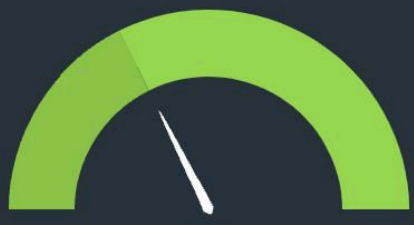
PLAN SUMMARY Last Updated: 21/08/2024 12:20 AM
 [Export as PDF](#)

John Doe, (20/11/2010, 13 years) NDIS 123456789 (Plan 123456 from 28/07/2022 to 27/07/2025)

Managed Plan Overview

Plan Overview
 3814104

Spent
\$27,519.37



36%

Budget	Spent	Remaining	Days Left
\$76,324.74	\$27,519.37	\$48,805.37	341

Plan start date


28-Jul-2022

Plan end date

27-Jul-2025


Support Purposes

CORE SUPPORTS




Budget	Spent	Remaining
\$5,220.38	\$3,549.51	\$1,670.87

CAPITAL SUPPORTS




Budget	Spent	Remaining
\$0.00	\$0.00	\$0.00


CAPACITY BUILDING SUPPORTS




Budget	Spent	Remaining
\$71,104.36	\$23,969.86	\$47,134.50



1300 599 770



planhero.com.au



John Doe, (20/11/2010, 13 years) NDIS 123456789 (Plan 123456 from 28/07/2022 to 27/07/2025)

Managed Plan Overview

Plan Overview
3814104

Spent

\$27,519.37

36%

Budget

\$76,324.74

Spent

\$27,519.37

Remaining

\$48,805.37

Days Left

341

Plan start date

28-Jul-2022

Plan end date

27-Jul-2025

Support Purposes

CORE SUPPORTS

68%

Budget

\$5,220.38

Spent

\$3,549.51

Remaining

\$1,670.87

CAPITAL SUPPORTS

0%

Budget

\$0.00

Spent

\$0.00

Remaining

\$0.00

CAPACITY BUILDING SUPPORTS

34%

Budget

\$71,104.36

Spent

\$23,969.86

Remaining

\$47,134.50

12:02

PLAN HERO

BUDGET VS ACTUAL

Last Updated

11:50 AM 01/05/2024

Export as PDF

Plan: 1082442 22/03/2024 to 22/03/2025

Mandy Amee

NDIS: 430279323 Plan: 1082442

Plan Duration: 365 days

Days Till Expiry: 326 days

Time Passed: 39 days

Used: 6%

Approved Budget: \$115,076.51

Used: 30%

Budget Calculation Explained

Core Supports

20%

12:02

PLAN HERO

30%

70% Remaining

30% Spent

Total Budget

\$115,076.51

Days Left

326

Plan start date

22-Mar-2024

Plan end date

22-Mar-2025

Category


Provider

Last Month Spent

10% Consumables

11%

Manage Claims



- Dashboard
- Summary Report
- Statements
- Claims**
- Participants
- Plans
- Help

CLAIMS

Search Options

Select Participant...

Provider

Status

Payment Status

Invoice Number

Date Filter Type*
Create Date

Date From*
22/07/2024


Date To*
22/08/2024

Advanced Search Options

Clear

Search

Invoice Number	Plan ID	Participant	Invoice Date	Submit Date	Beneficiary	Provider	Total Amount	Status	Payment Status	Created At
123	3814104	John Doe	15/08/2024	16/08/2024	Provider	Jim's Cleaning	\$405.36	NDIS Paid	Paid	16/08/2024 12:51 PM
123456	3814104	John Doe	07/08/2024	15/08/2024	Provider	Social Stars	\$193.99	NDIS Paid	Paid	15/08/2024 11:53 AM
78910	3814104	John Doe	09/08/2024	12/08/2024	Provider	Optimum Physio	\$214.41	NDIS Paid	Paid	12/08/2024 10:24 AM



CLAIM DETAILS

Reject

Approve

Participant Name	Maria Smith
Plan ID	123456789
Plan ID	123456789
Created At	22/07/2024 10:24 AM
Provider Name	SMITH'S CARE
Beneficiary	BELOZ WE CARE
Provider	Provider
Created At	22/07/2024 10:24 AM
Status	Entered
Payment Status	Pending
Approved Name	Maria Smith

Pay Amount: \$130.94

Invoice Total: \$130.94

Added Services

Support Item


123456789, 123456789 Assistance With Self Care Activities - Standard - Weekday Daytime

Dashboard

Claims

Plans

Participant Goals



- Back to Dashboard
- John Doe**
State: VIC
NDIS #: 123456789
DOB: 20/11/2010 (13 years)
Price Zone: VIC - Non-Remote
Plan: 123456
28/07/2022 - 27/07/2025
- Switch Plan
- Plan Summary
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PARTICIPANT GOALS

Short Term Goals

Goal Type	Description
Social and community activities	I would like to increase my social skills, and develop an understanding of age appropriate social cues and behaviours to develop and maintain friendships.
How I will achieve this goal	I will achieve this goal by utilising supports from informal and mainstream resources, Allied Health Professionals and Informal supports and by building my capacity, growing my independence and strengthening my skills. I will follow a personalised support plan that will outline and address my support needs. I will be able to undertake my daily routine to ensure I'm able to get my wants and needs met in accessing a range of environments including home, school and community settings.
How I will be supported	I will be supported by my Allied Health Professionals, Informal supports at home and in the community. I will continue to be provided with opportunities at home and in the community to practice these skills and strategies to support the goal. There will also be a plan in place that assists Madeleine and Joseph to achieve the goal with Mariella.
Independence	I would like to increase my independence and be able to dress myself, pack my school bag and go to the bathroom alone.

John Doe

DOB: 20/11/2010 (13 Years)

NDIS #: 123456

Plan: 123456789, 28/07/2022 to 27/07/2025

Plan Duration: 1096 days

Days till Expiry: 341 days

Time Passed: 755 days

Progress: 69%

Approved Budget: \$76,324.74

Used: 36%

Monthly Statements

Receive a monthly statement that includes an easy to understand visual of overall spending and remaining budget.

Budget Summary



Table of spending summaries

CORE SUPPORTS Budget \$13,935.11 Spend \$528.29 Remaining \$13,406.82

No.	Support Category	Budget	Last Month	Spend to Date	Left to Spend	% Spend
1	Assistance with Daily Life (Includes SIL)	\$13,635.11	\$389.68	\$528.29	\$13,106.82	3.87%
	Maid2Match Pty Ltd	\$4,091.64	\$389.68	\$528.29	\$3,563.35	12.91%
2	Transport	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
3	Consumables	\$300.00	\$0.00	\$0.00	\$300.00	0.00%
4	Assistance with Social, Economic and Community Participation	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
Total		\$13,935.11	\$389.68	\$528.29	\$13,406.82	3.79%

CAPITAL SUPPORTS Budget \$0.00 Spend \$0.00 Remaining \$0.00

No.	Support Category	Budget	Last Month	Spend to Date	Left to Spend	% Spend
Total		\$0.00	\$0.00	\$0.00	\$0.00	0.00%

CAPACITY BUILDING SUPPORTS Budget \$26,601.24 Spend \$1,757.48 Remaining \$24,843.76

No.	Support Category	Budget	Last Month	Spend to Date	Left to Spend	% Spend
7	Support Coordination	\$2,403.36	\$0.00	\$0.00	\$2,403.36	0.00%
14	Improved Life Choices	\$1,485.96	\$104.45	\$545.70	\$940.26	36.72%
	PLAN HERO PTY LTD	\$1,485.96	\$104.45	\$545.70	\$940.26	36.72%
15	Improved Daily Living Skills	\$22,711.92	\$533.46	\$1,211.78	\$21,500.14	5.34%
Total		\$26,601.24	\$637.91	\$1,757.48	\$24,843.76	6.61%



Feature Summary

- ★ **Monitor Live Spending:**
Keep track of Participants' budgets in real-time.
- ★ **Track Service Agreements:**
Stay informed of service agreements effortlessly.
- ★ **Receive Plan Notifications:**
Get instant alerts to keep updated on crucial plan changes.
- ★ **Review, Approve, or Reject Claims:**
Simplify the claim process with easy review and approval options.
- ★ **View Invoices:**
Access and view the invoices associated with claims.
- ★ **Track Participant Goals:**
Including automatic updates after plan reviews.
- ★ **Manage Profiles:**
Easily update email, 2FA security preferences, and notification alerts.
- ★ **Monthly Statements:**
Receive detailed summaries to stay informed on spending.
- ★ **Multi-Participant View:**
Carers and Support Coordinators can manage multiple participants from a single login.
- ★ **Plan Budget Forecasting Tool:**
Support Coordinators can also access the budget forecasting tool for their associated Participants.