



Plan Hero Welcome Pack

This onboarding manual will help you get started with Plan Hero!

WELCOME



We are so glad to have you join our Plan Hero family.

Plan Hero strives to support YOU in finding the information you need to understand your NDIS plan and assist in making informed choices from the options available.

Our aim is to ease the stress around managing your NDIS funds, and to give you the tools and information needed to keep track of your spending and get the most from your plan.

Get in touch

We are always available to give a helping hand, answer any questions and listen to your concerns.

 **1300 599 770**

 support@planhero.com.au

WHAT HAPPENS NEXT?



1. Check your emails

For next steps (check spam/junk inbox too)



2. Finalise your registration

Your plan manager will call you in the next 24 hours to finalise your registration



3. Read this manual

To know how Plan Hero works and how to get invoices paid



4. Unpack your plan

Book a 1:1 'Unpack your plan' call to go through your plan funding

WHAT DOES PLAN HERO DO?

- 1.** Pay your providers
- 2.** Budget tracking & reporting (monthly)
- 3.** Help you understand your plan and how to use it
- 4.** Let you know if you are overspending and manage your budget accordingly
- 5.** Support decision making when it comes to your providers and how you use your funding
- 6.** Help you find services and supports in your local area

We help make sure your funding is being spent as intended — and most importantly, that it helps you meet your goals.

WHAT DON'T WE DO?

1. Organise or schedule your services with providers
2. Manage your schedule or appointments
3. Provide disability related advocacy services

If You Require Advocacy Support,

[Click Here](#)

HOW MUCH DOES PLAN HERO COST?

Plan Management funding comes from a separate area of your plan under Capacity Building Supports called **IMPROVED LIFE CHOICES (Choice & Control)**.

Capacity building supports

Improved life choices (CB choice & control)

Stated support: Financial intermediary set-up costs and monthly processing fees for your plan manager to manage your plan.

It includes:

Monthly service fees that will be paid directly by the NDIS

There is NO out of pocket cost to you!

This funding **CANNOT** be used for any other supports or services in your plan.

HOW WILL MY BILLS BE PAID?

Invoices can be sent to us for payment by YOU (or your representative) or by a PROVIDER via email.

All **new** providers will need to be verified before we can make their first payment



Send invoices to

invoices@planhero.com.au

WHAT IF I HAVE ALREADY PAID FOR THE SERVICE?

Payments can be reimbursed if the services are funded in your plan.

To request a reimbursement, you will need to submit:

- The original invoice (must show what supports were provided, provider ABN, rate/hr and date of support)
- Proof of payment (such as a bank statement)
- Bank account details (for the reimbursement)

What reimbursements WON'T we process?

- Reimbursements over \$500 – these need to be approved by your plan manager BEFORE you make payment – email support@planhero.com.au for confirmation
- Support workers invoices – direct support worker claims will be paid directly to your support worker

Email all documents to

payme@planhero.com.au

HOW ARE INVOICES APPROVED?

Standing approvals

This is the DEFAULT approval. Any invoice submitted by you, your representative or your provider will be automatically approved by us unless you request to have these invoices manually approved

Manual approval

If you opt-out of standing approval for all or some providers, this means you will be required to approve each invoice as they are submitted. You can do this via the portal, or via email/phone.

Note:

If you send/upload the invoice yourself, these will be automatically approved as YOU have submitted it.

HOW DO I KNOW HOW MUCH FUNDING I HAVE SPENT?

Leave it to us!

We will send you a summary every month that shows exactly how much you have spent and how much you have left.

It also shows you a summary of payments made on your behalf to your providers so you can double check those standing approvals.

If you would like help understanding how you can use your funding better, get in contact with our friendly team and we will help you unpack your plan.

HOW DO I AVOID OVER/ UNDER SPENDING

Overspending =

spending funds too quickly OR running out of funds

Underspending =

not using enough of your funds

If you spend more money than available in your plan, you will have to **pay out of your own pocket** for continued supports.

If you are **underspending** you risk having your NDIS budget reduced following your annual plan meeting.

On the next page you will find some tips to avoid over or underspending your budget:

AVOID OVER/UNDER SPENDING

1. Check budget emails from Plan Hero

Plan Hero will send you budgeting emails when we notice you are overspending or underspending funds. It is your responsibility to review these, and get in touch if you would like understand how to get more supports OR use less funds (avoid out of pocket costs).

2. Set up Service Agreements

Service Agreements are signed documents between YOU and YOUR PROVIDER to ensure you are both protected. They outline the type of supports, cost, responsibilities and more - Click [HERE](#) to see what info a Service Agreement should include

3. Negotiate Pricing

The NDIA set maximum prices that a provider can charge you, however it is completely within your right to negotiate lower prices with your provider if you feel necessary, including provider travel costs.

CAN YOU HELP ME FIND SUPPORTS AND SERVICES?

We have partnered with **MyCareSpace**, which is a free community service.

Their connections team will help you find services that meet your needs in your local area.

Click [here](#) for our MyCareSpace VIP form



WHAT IF I AM NOT HAPPY WITH PLAN HERO'S SERVICE?

You can email us at any time and we will do our utmost to make things right. As always, YOU are our priority and we are here to help ease the stress.

 1300 599 770

 hello@planhero.com.au

When you tell us what you like or don't like, we will listen. And we will try to change things if we can. You will always receive a reply as quickly as possible.

If you are still unhappy you can send a complaint the NDIS Commission:

 www.ndiscommission.gov.au

 1800 035 544

 133 677