

The background of the image shows two women on a staircase. One woman, with blonde hair and wearing a blue sweater, is leaning over the railing and smiling at the other woman. The second woman, with dark hair and wearing glasses and a white top, is sitting in a wheelchair and looking up at the first woman with a smile. The staircase has a red handrail and a wooden balustrade.

**Plan Hero
Your #1
Plan Manager**

We are an independent, specialist Plan Manager

With extensive NDIS knowledge and experience, we support our Participants to understand their plan and how to get the most from it.

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

You have your own Plan Manager, so you only deal with one person who gets to know you and your participants.

You can always get hold of us. We answer your emails and don't put you on hold (ever) and we call you back if we miss you (really).



Why our clients think Plan Hero is the BEST Plan Manager

- 1. Easy Communication with Real People** – Our Plan Managers are approachable, responsive, and explain things in plain English – not jargon
"I just want someone I can talk to when I'm unsure about something."
- 2. Fast, Hassle-Free Payments** – we pay Providers' invoices accurately and promptly (within 3–5 business days)
"It's a relief knowing my supports get paid quickly without me chasing anything up."
- 3. Easy to use Online Portal and Phone App** – these help you keep track of your budgets and claims easily 24/7. We also send you easy to read monthly reports and spending alerts
- 4. Helping you understand your plan** – we explain what each budget category means and help you plan ahead so you don't run out of funds unexpectedly

[Find a Specialist Plan Manager](#)

 1300 599 770

 planhero.com.au



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

[Find a Specialist Plan Manager](#)

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 answer your questions** – let us know where you need help understanding your plan
3. **We check in with you regularly** – you choose how often you want us to check in



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



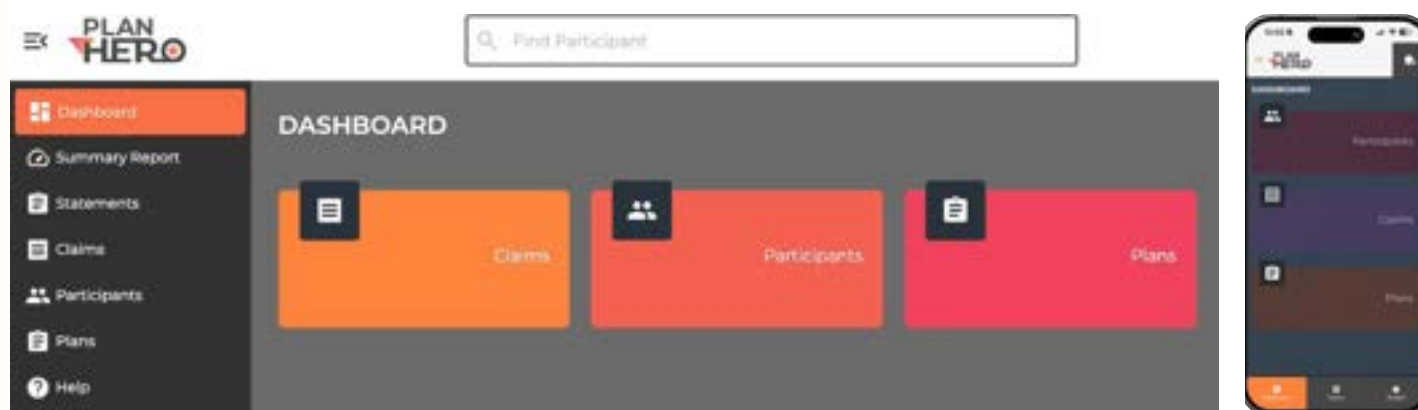
Your portal is easy to navigate for Participants and SC's



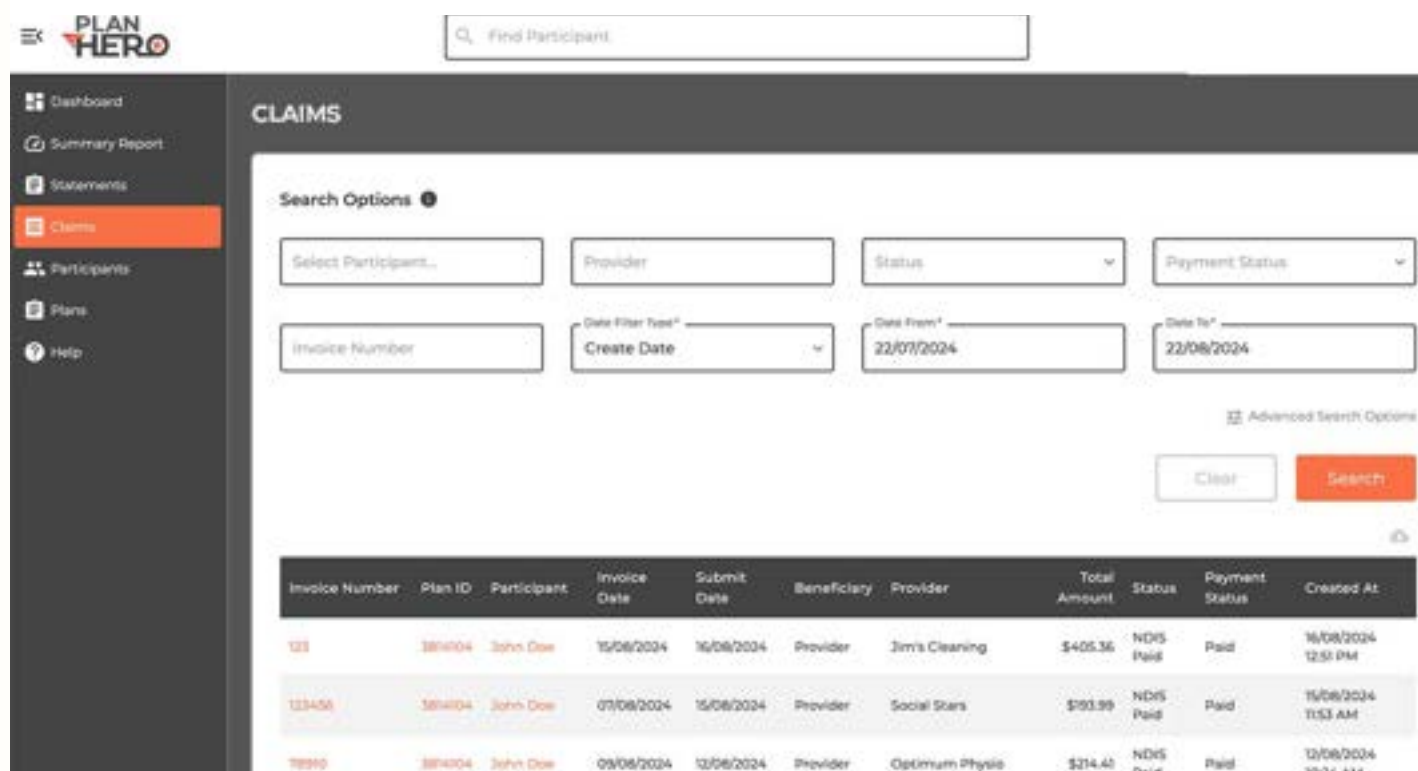
It's clear you have expert NDIS knowledge based on the support we are given with complex claims/situations

Samples of our the Plan Hero Online Portal and App

Easy Access to 24/7 live data

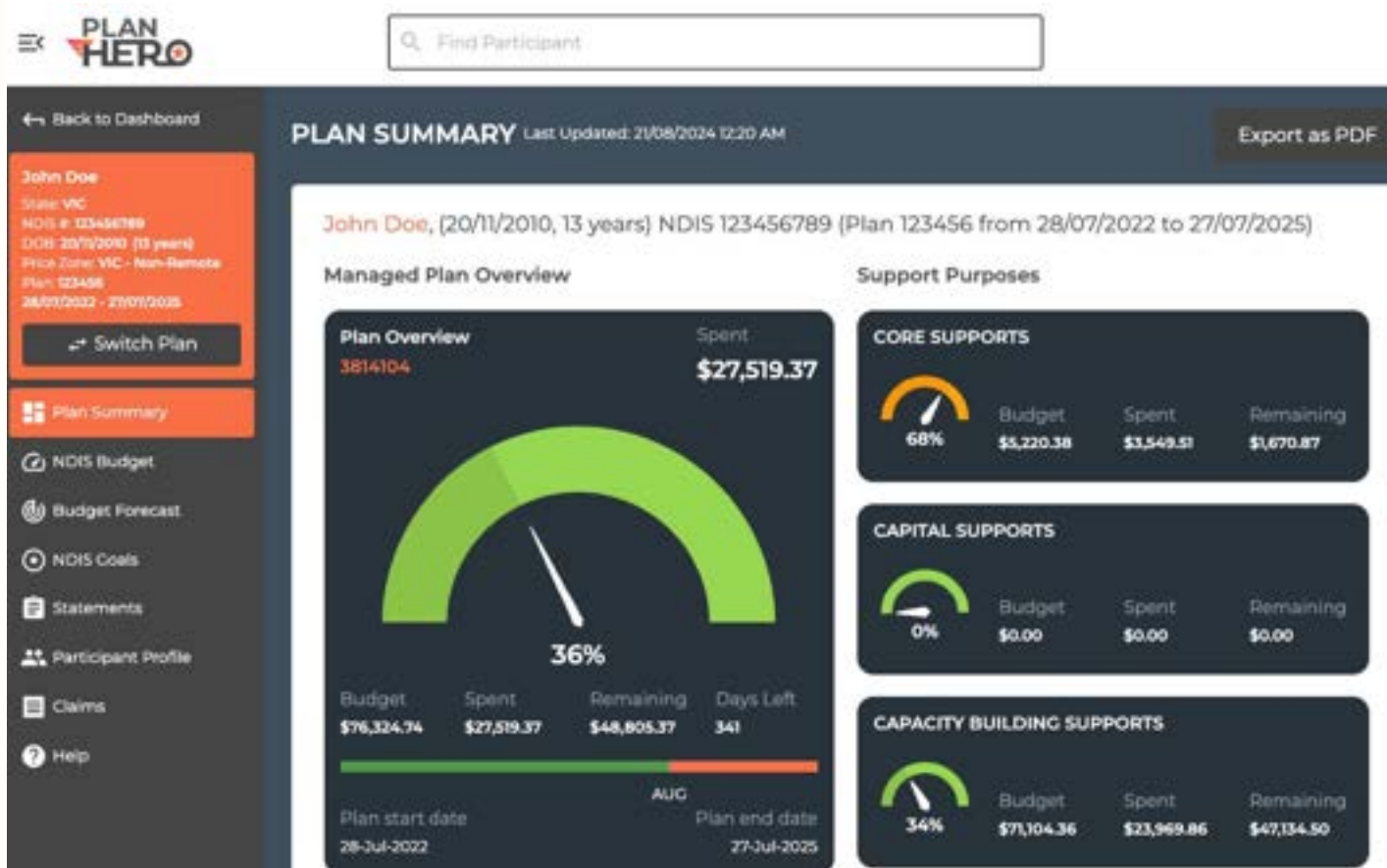
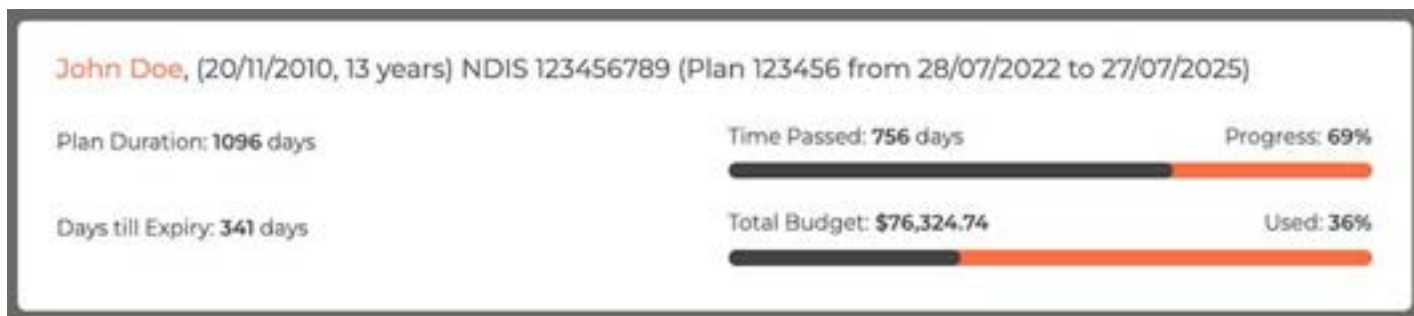


You have you own login and arrive at your dashboard.



You manage all your Participants from one place

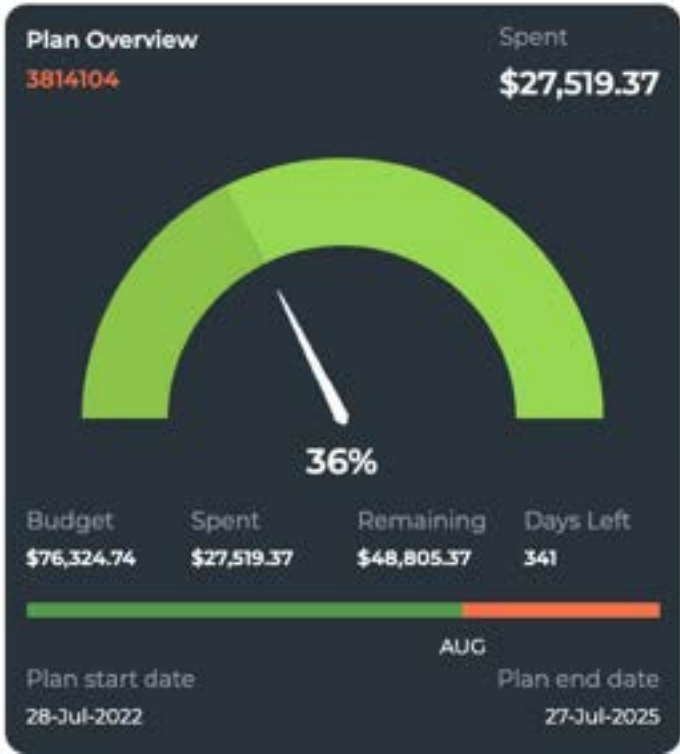
Easy visual way to keep track of spending throughout the plan



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

Managed Plan Overview

Support Purposes



Manage Claims

PLAN HERO Find Participant

CLAIMS

Search Options

Select Participant... Provider Status Payment Status

Invoice Number Date Filter Type* Create Date 22/07/2024 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	384004	John Doe	15/06/2024	16/06/2024	Provider	Jim's Cleaning	\$405.36	NDIS Paid	Paid	16/06/2024 12:51 PM
123456	384004	John Doe	07/06/2024	16/06/2024	Provider	Social Stars	\$93.99	NDIS Paid	Paid	16/06/2024 11:53 AM
78910	384004	John Doe	09/06/2024	12/06/2024	Provider	Optimum Physio	\$214.41	NDIS Paid	Paid	12/06/2024 10:24 AM



Participant Goals

PLAN HERO Find Participant

PARTICIPANT GOALS

John Doe
State: VIC
NDIS #: 123456789
DOB: 20/11/2010 (13 years)
Plan: 123456789, 28/07/2022 to 27/07/2025
Switch Plan

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
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.



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.