



Plan Hero – The Best Plan Manager

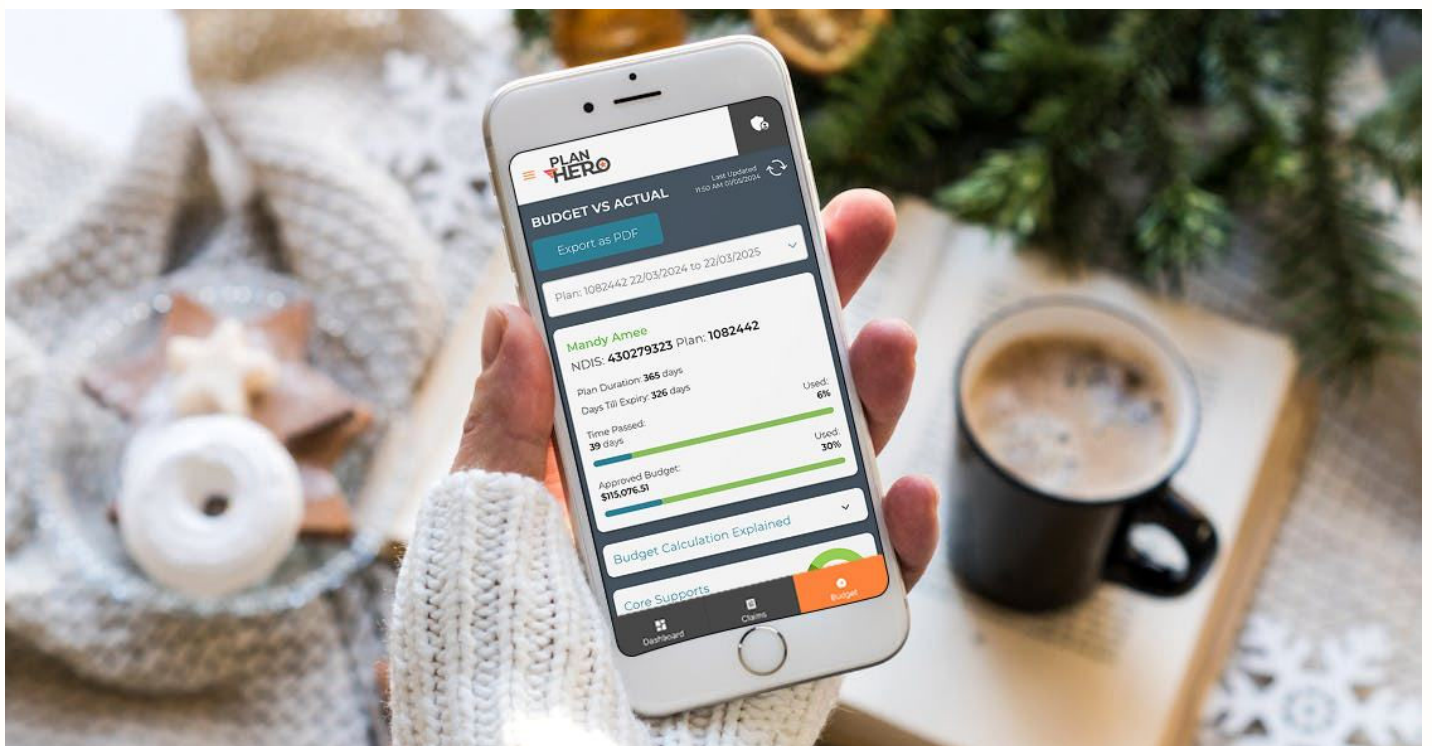
We are a specialist, independent, boutique Plan Manager.

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.

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

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).



6 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 you need. 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 well. They will answer your questions.
- 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.
- 6. We respond quickly** – our team answers your questions and processes your invoices on time!



How to sign up

- 1. Give us a call** – we can sign you up over the phone, no problem!
- 2. Register 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



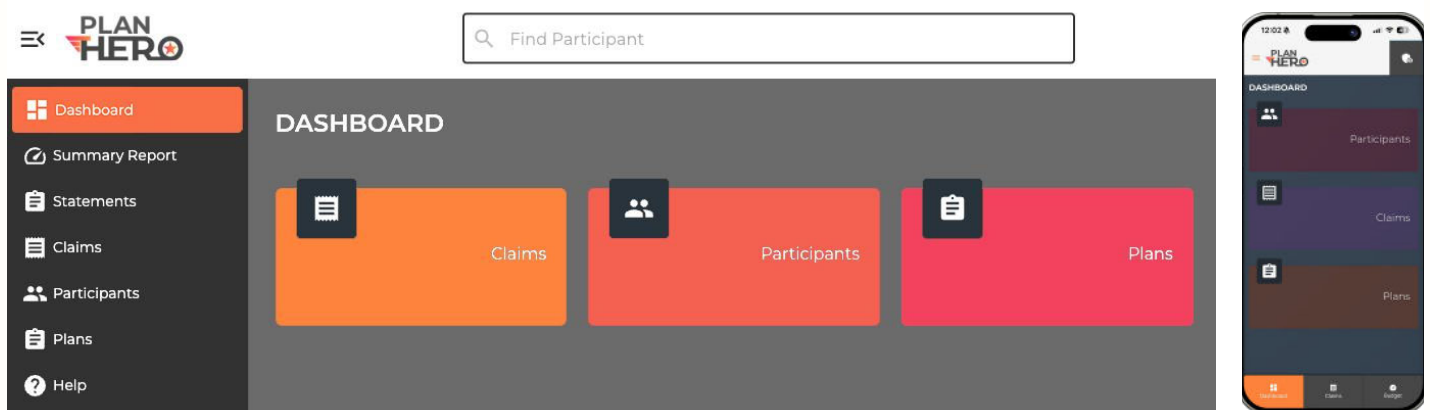
Your portal is easy to navigate for Participants and SC's



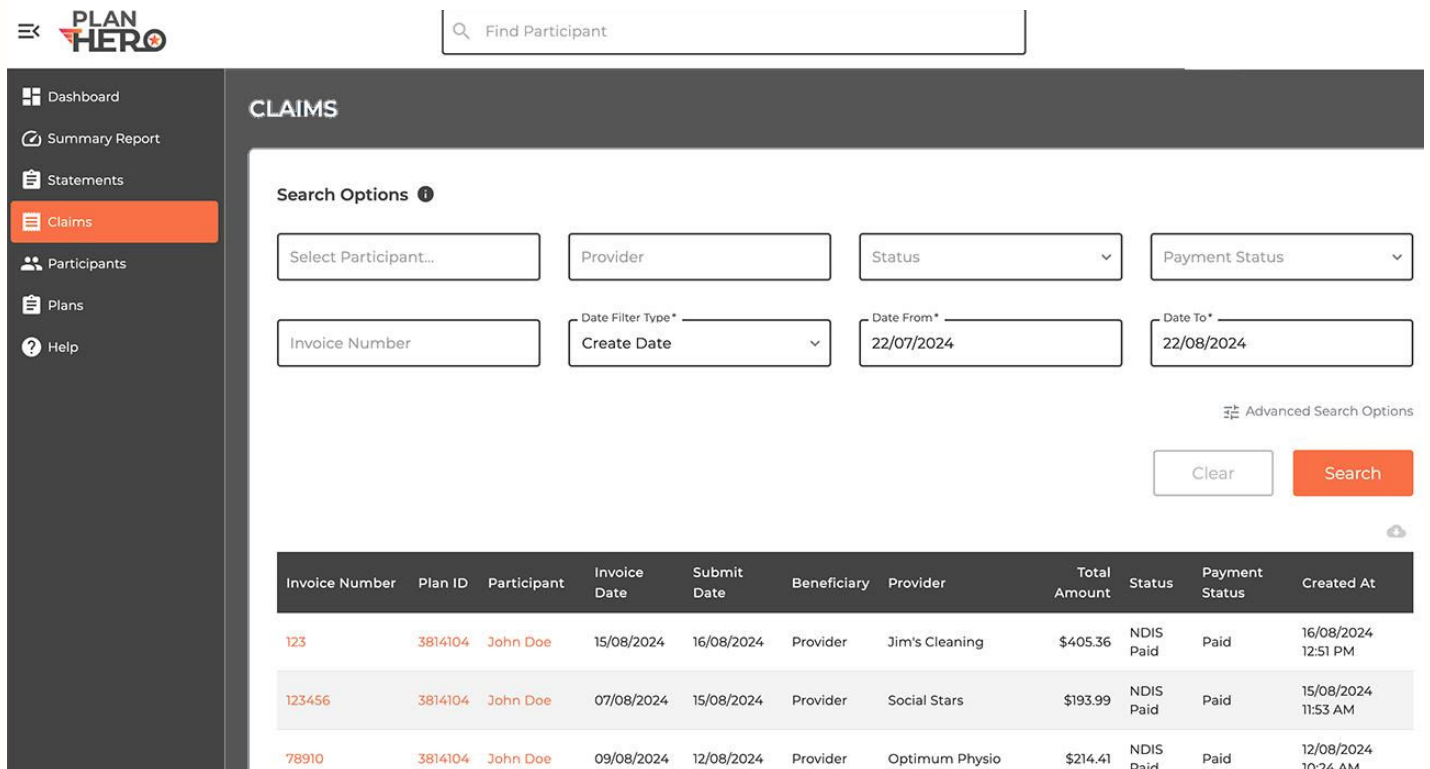
It's clear you have expert NDIS knowledge based on the support we are given with complex claims/situations

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)

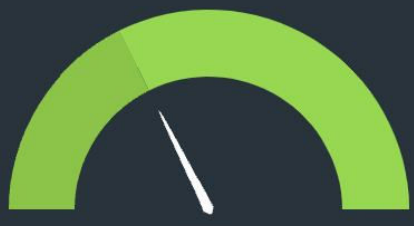
Managed Plan Overview

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



68%

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

CAPITAL SUPPORTS



0%

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

CAPACITY BUILDING SUPPORTS



34%

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



1300 599 770



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CAPACITY BUILDING SUPPORTS



34%

Budget	Spent	Remaining
\$71,104.36	\$23,969.86	\$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%

Budget	Spent	Remaining
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Dashboard

Claims

Budget

12:02

PLAN HERO



30%

70% Remaining

30% Spent

Total Budget \$115,076.51

Days Left 326

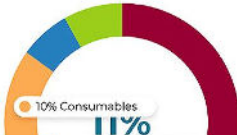
Plan start date 22-Mar-2024

Plan end date 22-Mar-2025

Category

Provider

Last Month Spent



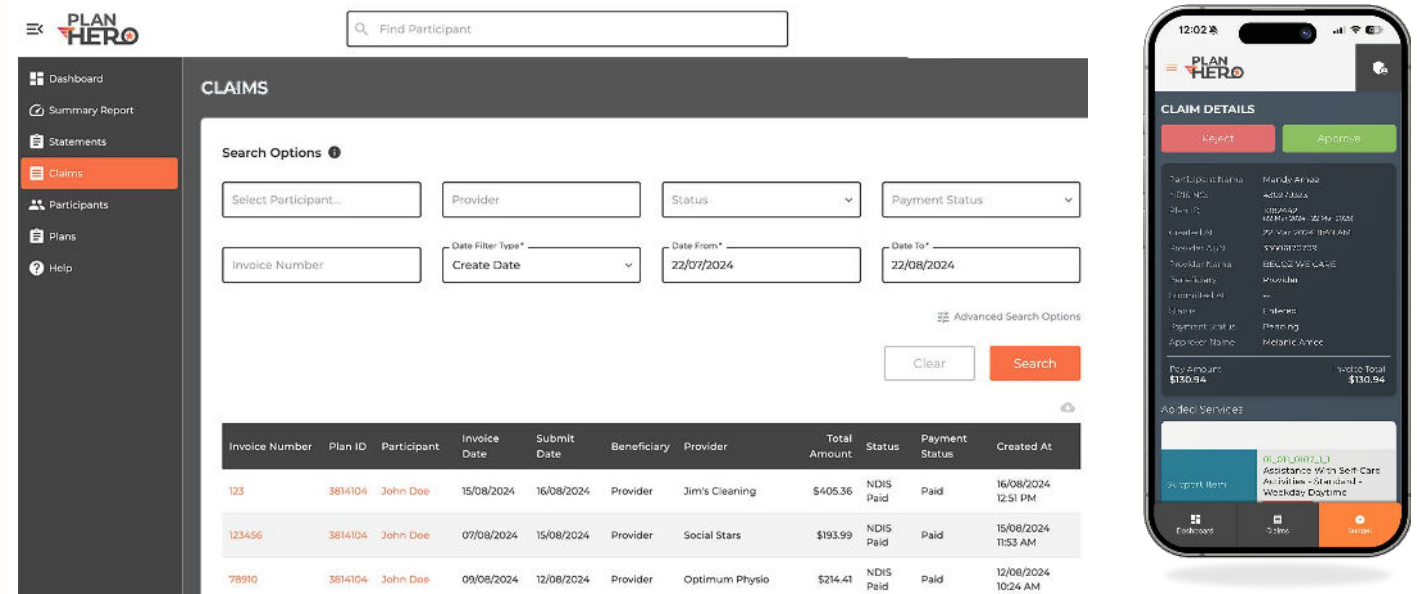
11%

Dashboard

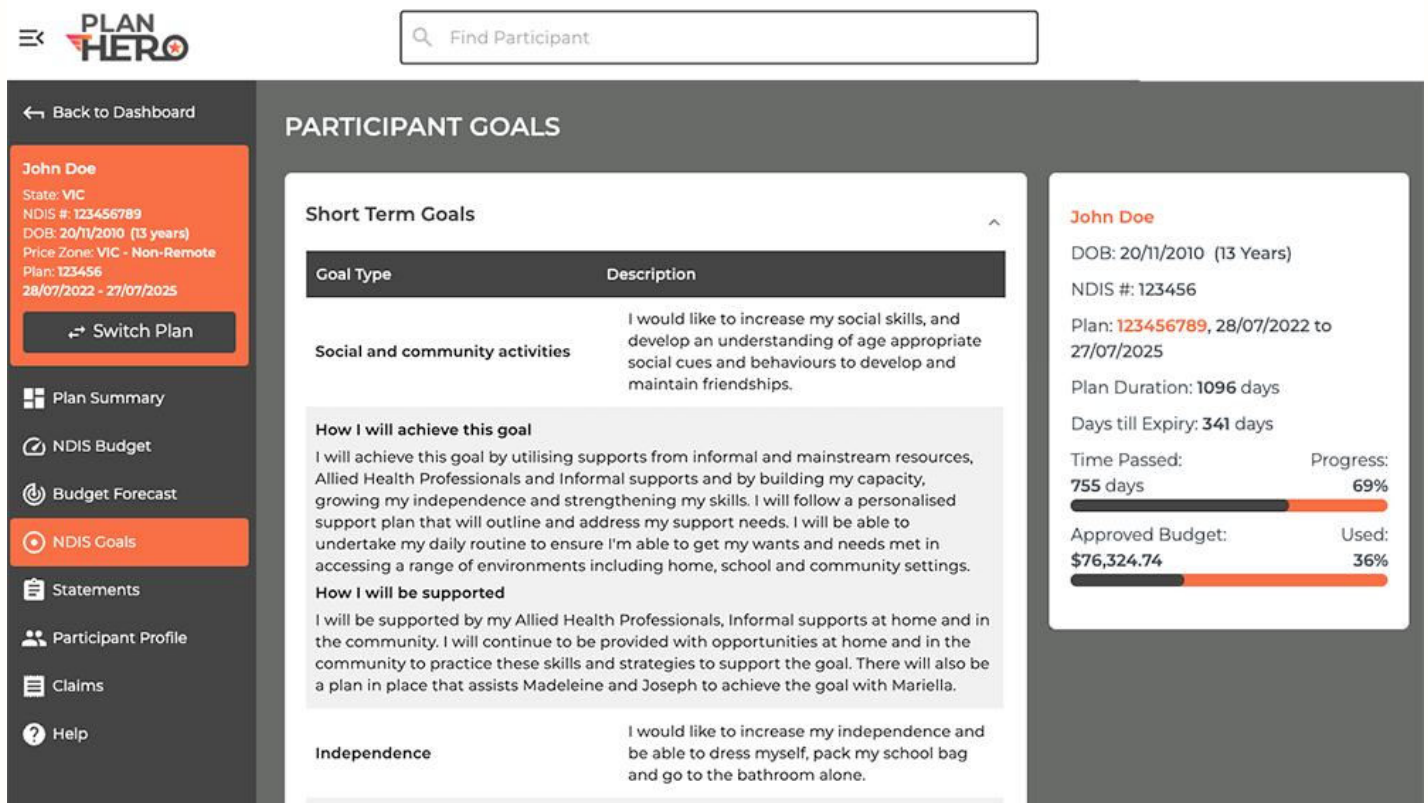
Claims

Budget

Manage Claims



Participant Goals



Monthly Statements

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

Budget Summary



Visual of spending breakdown by Provider

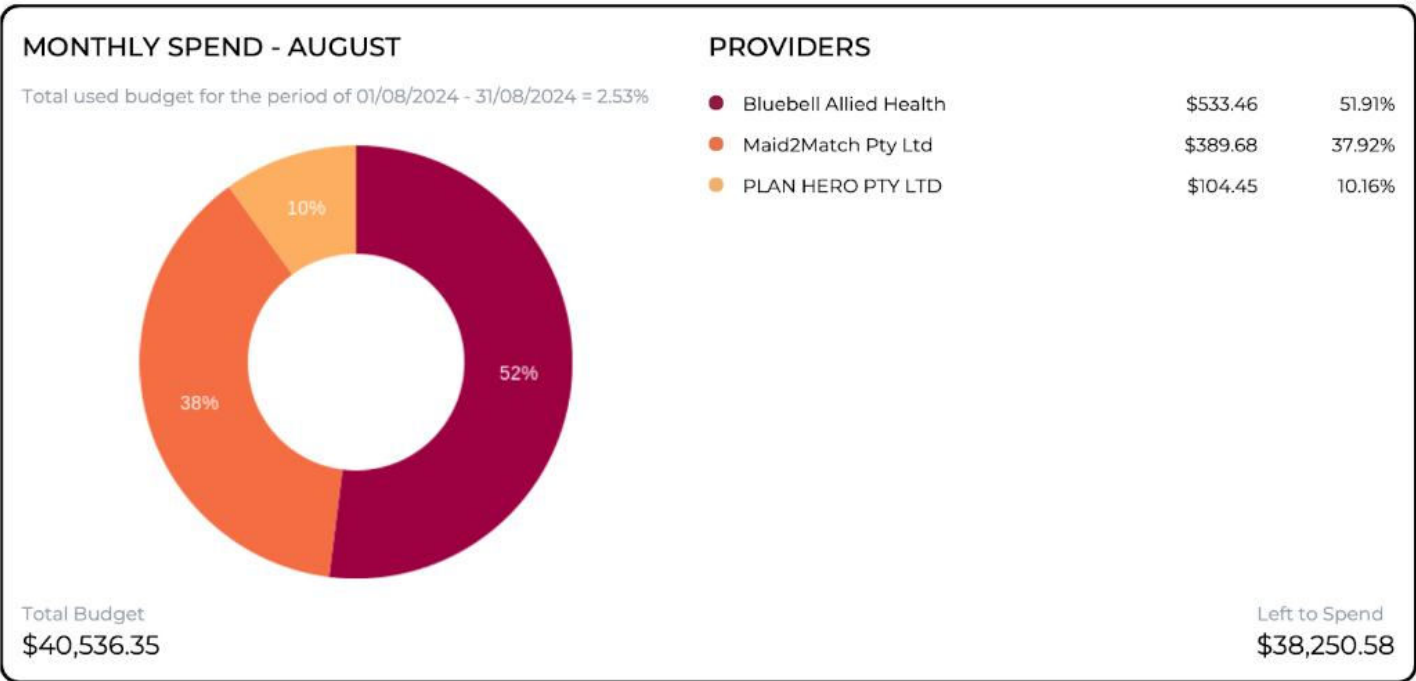


Table of spending summaries

CORE SUPPORTS				Budget	Spend	Remaining
				\$13,935.11	\$528.29	\$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	Spend	Remaining
				\$0.00	\$0.00	\$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	Spend	Remaining
				\$26,601.24	\$1,757.48	\$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.