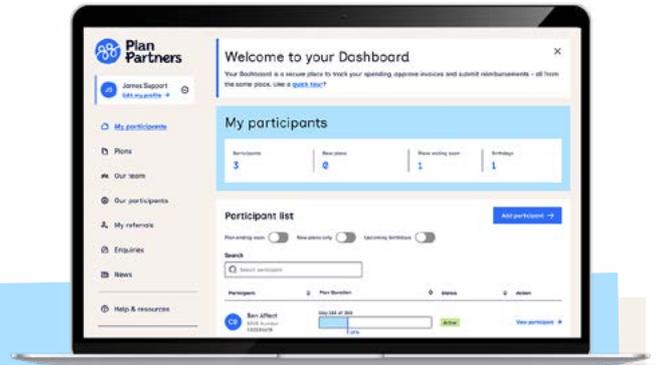


Quick Guide to your Dashboard



Your Support Coordinator Dashboard gives you complete visibility over all your Plan Partners participants' plans and spending, allowing you to manage everything from one central place.

Designed with your workflow and participant journey in mind, your Dashboard gives you up-to-date information when you need it, saving you time and keeping you on track.

Read on for our quick guide to just some of the features of our Dashboard.

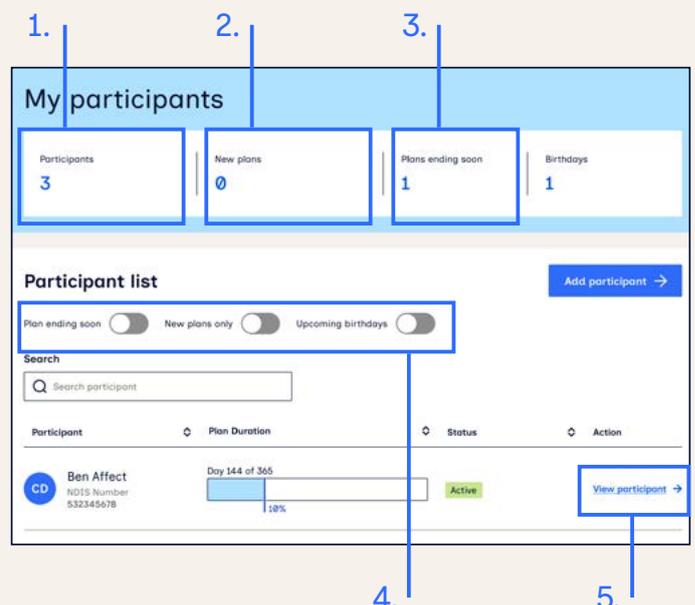
With features that make your NDIS journey easier, including:

- Create invoices from ready-made templates generated straight from your Dashboard.
- See detailed live statuses for invoices, including any action needed.
- Refer customers to Plan Partners directly through the Dashboard.
- View service agreements you have in place with Plan Partners' customers.

Easy Navigation

A handy navigation bar helps you find your way round your Dashboard easily.

1. The number of Plan Partners participants assigned to you in the Dashboard.
2. Any new plans that have been set up or renewed by us in the last 7 days.
3. Plans ending in the next 90 days.
4. Filter by 'plans ending soon' or 'new plans' to see which ones need your immediate attention.
5. Click on participant to see exactly what they see, so you can work with them to build their capacity.



In My Plan

A helpful graph gives an instant snapshot of spending and budgets.

1. See all the providers making claims against your participant's NDIS plan to easily resolve payment issues and have easy access to their contact details.
2. Detailed reports on your participants' budgets, including what's being claimed by providers and the status of invoices.
3. How much your participant has spent in relation to their plan.
4. How much your participant has allocated to providers under their service agreements.
5. How much your participant has available in relation to their plan.

Plan Partners Welcome to your Dashboard

Your Dashboard is a secure place to track your spending, approve invoices and submit reimbursements – all from the same place. Like a quick tour?

My plan Ben Affect NDIS Number 532345678

Plan date: 24/07/2024 - 24/06/2025

| | | | |
|----------------------------|-------------------------------|------------------------|----------------------------|
| Total plan managed funding | Released funds as of 00/00/YY | Days remaining on plan | Invoices awaiting approval |
| \$100,000 | \$7,500 | 100 | 2 |

Now my total plan managed funding is calculated

Plan managed budget overview

A handy snapshot of your plan managed funds. To dive deeper or check how your funding is allocated, just select the support category you're interested in.

Filter your budget: Overview, Core, Capital, Capacity Building

Plan Managed overview

This provides an overview of your funding and how you are tracking against each component within your plan.

| | | |
|--------------------|------------|-----|
| Released | \$1500.00 | 44% |
| Spent | \$1910.00 | 28% |
| Service agreements | \$1120.00 | 28% |
| Available | \$1,835.00 | |

Funding component overview

Core

| | | |
|--------------------|------------|------|
| Released | \$4500.00 | 100% |
| Spent | \$225.00 | 5% |
| Service agreements | \$450.00 | 10% |
| Available | \$1,125.00 | |

Tracking Funds key: Available, Today

A history of all your invoices processed with us

Every invoice, tracked in real time, so you're always up to date.

1. Detailed live statuses, so you know exactly where your invoice is in the processing cycle.
2. See all invoices processed with us and get detailed live statuses to explain where each invoice is in the processing cycle.

Invoices and reimbursements View more invoices and reimbursements →

Search: Search, Status: Select category, Category filter: Select category, Providers & reimbursements: Select a provider

| Invoice number | Provider | Date | Status | Date Paid | Total | Action |
|----------------|-------------------------------|--------------|-----------|--------------|-----------|---|
| 1234 | Reimbursement - Nappies to be | 24 July 2022 | New | - | \$ 100.00 | Edit submission Edit available for → 4:42 mins |
| 1234 | Provider name | 24 July 2022 | Cancelled | - | \$ 100.00 | View details → |
| 1234 | Provider name | 20 July 2022 | Paid | 24 July 2022 | \$ 100.00 | View details → |

Plan Partners My plan / Invoices / Invoice details - 323 456

Invoice details Invoice status: Needs your approval

Provider name here: 22 Bell Street, Coburg 3030, VIC
Address: 22 Bell Street, Coburg 3030, VIC
Job: 52 123 123 123
Email: admin@planpartners.com.au
Phone: 8438 814 354

Invoice Number: 123 456
Invoice Date: 04 Dec 2024
Paid Date: []

Invoice progress

Needs your approval

Please review this invoice to make sure all details are correct, and click on the approve button if OK to pay.
Remember: your invoices are set to automatically approve after 2 days if no action is taken. You can change how your invoices are approved at any time in your preference centre.

Email
info@planpartners.com.au

Call us
1300 333 700

Live chat
planpartners.com.au

