BudgetNet | Plan Management

Budget Tracking App Guide

Making tracking your NDIS funding as easy as possible with our Budget Tracking App.

Let's take you through a step-by-step guide to our Careview Advantage App.

Once you've signed up with us, you will receive our "Welcome to Careview Advantage" email. If you don't receive the email within 2 business days of signing our service agreement, please check your junk/spam folder or give us a call.

Download the Careview Advantage app on your smart device to get started!

Download on the App Store

GET IT ON Google Play

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App Guide

Account Setup

Here is an example of the email that will be sent to you with your Careview Advantage log in details.

Hi {YOUR NAME},

As a valued client of BudgetNet, we'd love for you to gain the benefits of using the Careview Advantage mobile app. Careview Advantage is designed to give you real-time visibility of all your funding that we are managing for you, such as:

- Plan total, delivered and remaining values
- Budget Category total, delivered and remaining values
- Monthly summary of delivered services
- View your invoices

You can download Careview Advantage from the App Store or Google Play Store by searching 'Careview Advantage'

Please use the below username and temporary password details:
Username: *Here will be your NDIS number/username*
Temporary Password: *Here will be your password for your first sign in on the app*

When you log back in to Careview Advantage, you will be asked to reset your password.

Please note that when you install the mobile app, it may ask you permissions to manage your phone calls. The reason this permission is required is so that you can receive notifications when we process your invoices. The application does not need to manage your phone or make phone calls.

Unfortunately, if you don't give the app this permission you will be unable to access the app.

Kind Regards,
BudgetNet

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App Guide

Step one: Sign In

Enter the Username (your NDIS number) and Password listed in the "Welcome to Careview Advantage" email we sent you.

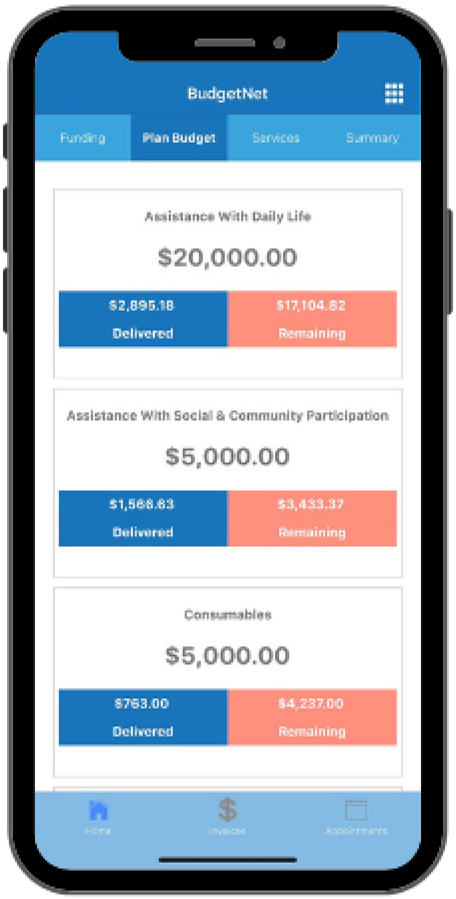
You should receive this email within 2 business days of signing our service agreement.

Make sure you check your junk folder or give us a call if you have any issues.

Step two: Funding

Click "Funding" along the top menu bar to view this funding wheel.

It shows you the total amount that has been claimed from your plan in BLUE, and the total amount of funding you still have available in RED.



Step three: Plan Budget

Click "Plan Budget" along the top menu bar.

This page shows you the funding already delivered and what's remaining in each of the categories of your plan.

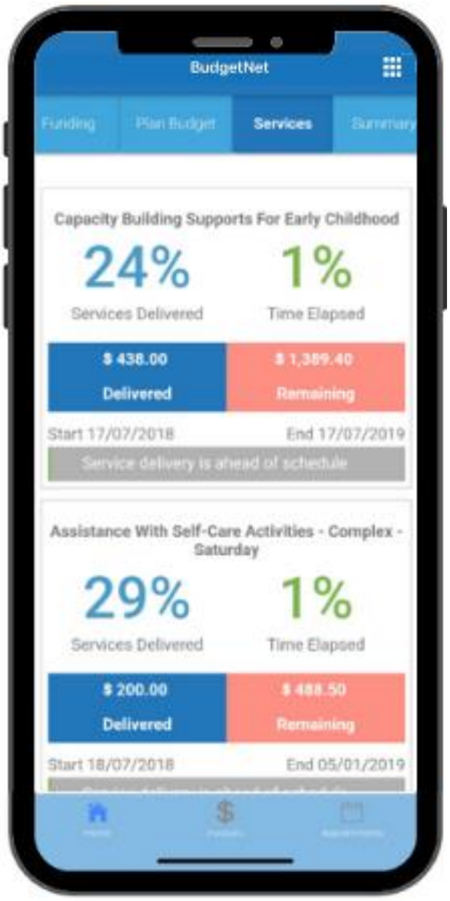
Remember your core funding will be split into categories but is totally flexible.

Step four: Services

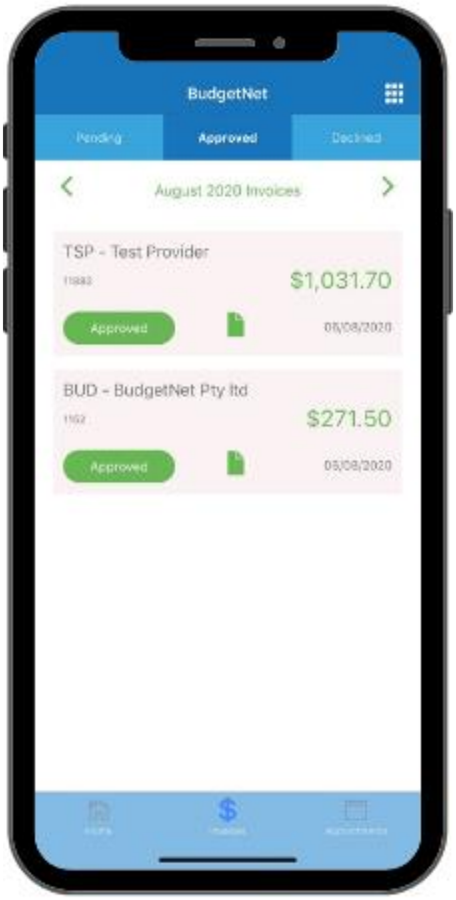
Click "Services" along the top menu bar to view your service agreements.

This screen shows you how much funding has been set aside in each service booking. You will see the funding used/delivered and what's remaining in that booking.

It gives you the start and end date for the booking, and whether you're ahead (extra funding) or behind schedule (not enough funding).



We're here to help BudgetNet.com.au 1300 402 568 ndis@BudgetNet.com.au



Step five: Plan Budget

Click "Invoices" on the bottom menu bar to view a list of invoices.

This is a great way to quickly monitor your spending.

You can choose between pending, approved or declined invoices by choosing the tab at the top.

The month will show at the top of the page in green and you can switch between months by using the arrows.

Our app is a fantastic way to track spending, it gives you control over your invoices and make managing your NDIS plan simple.

You can also find more resources about our app by visiting: https://desk.zoho.com.au/portal/careview/en/kb/articles/logging-in-for-the-1st-time