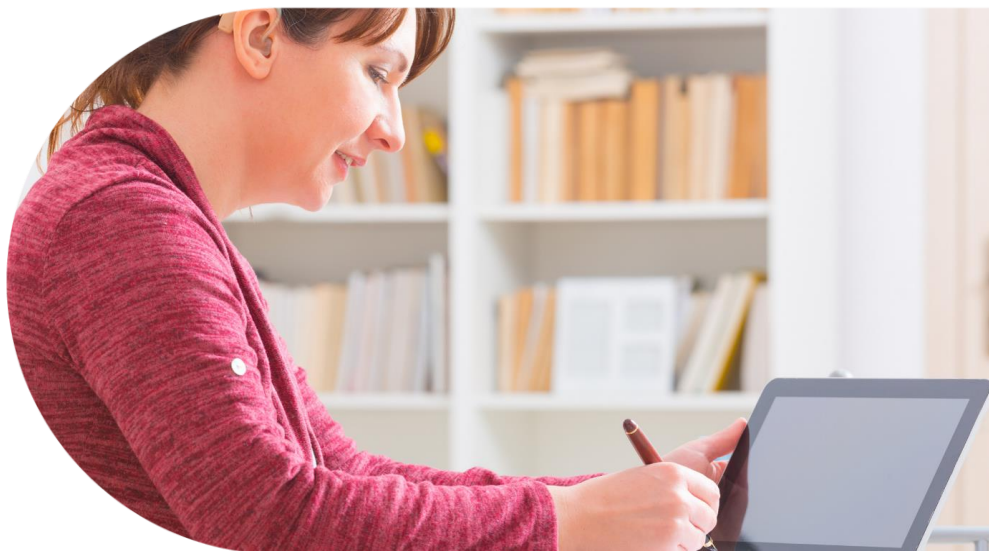# BudgetNet | Plan Management

Support Coordinator Handbook

As your participants plan manager, we ensure their NDIS bills are paid efficiently by our professional team.

Our aim is to work alongside the participant, yourself, and their providers to create a supportive environment to guide them through their NDIS journey.

We pride ourselves on the personalised service offered to each individual participant, whether they have 2 or 20 providers, we are here to answer their questions and make the process as simple as possible.

In order to provide the best possible service, we offer our Support Coordinator Portal (Careview Connect). This provides ultimate transparency, giving you all the funding information needed.

This handbook will guide you through our portal service should you decide to use it.

How to access the portal?

If you are listed as the Support Coordinator of a BudgetNet participant, you can choose to access our portal to keep track of their plan managed funds.

To gain access, please email us on ndis@budgetnet.com.au and include the name and NDIS number of the participant you represent. You can also complete the request form on our website: budgetnet.com.au/support-coordinator/.
We will send you a link, your username, and a temporary password. Just follow the prompts and you will be set up in just a few minutes.

Below, we will explore how the portal works.

Client Profile
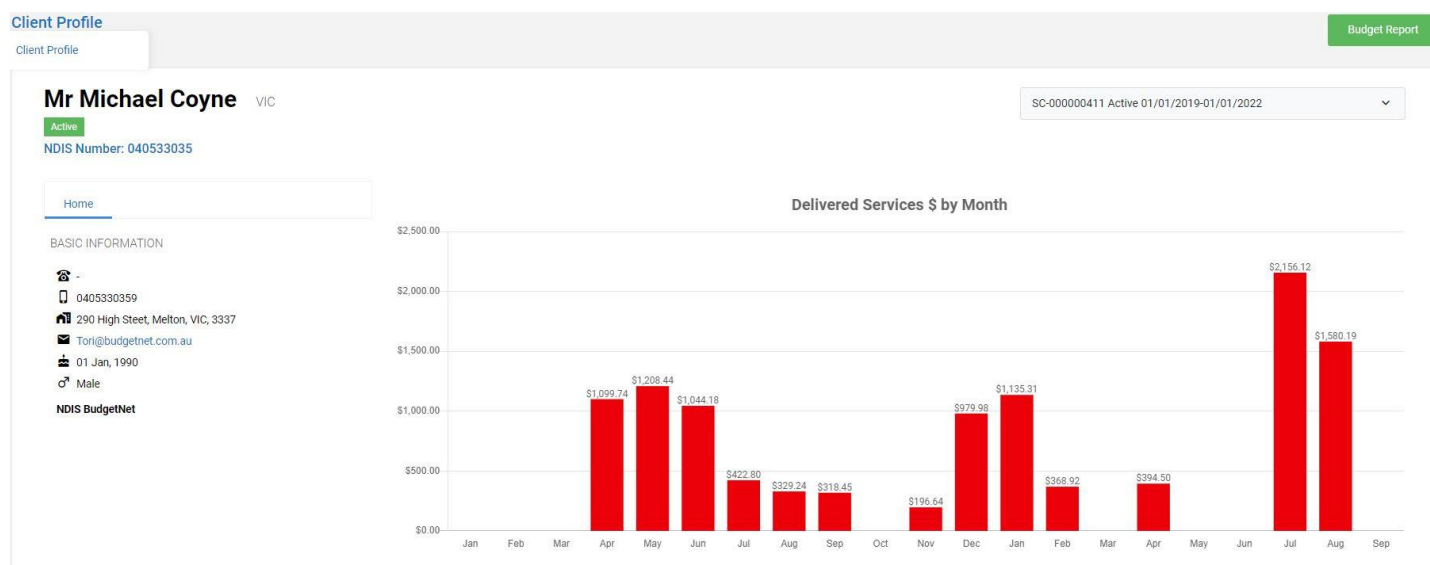
Once logged in, you will see a list of participant's names in which you have been granted access to funding information.
Select the participant's name you wish to explore from the home page. This will take you to their client profile.

Here you can view your participants contact information and NDIS number.
You can also view the Delivered Services $ by Month bar chart, the easiest way to see the amount of funding claimed each month from your participants plan.

Client Profile Continued

Total Funding	Total Allocation	Total Remaining	Total Delivered	Total Claimed	Total Unclaimed
$50,000.00	$41,425.01	$38,765.49	$11,234.51	$10,812.43	$422.08

You can also access a complete funding snapshot.

This summary gives you:
- The total funding amount within the plan
- How much has been allocated in service bookings to providers
- Funds available for new supports
- Total amount of services already delivered to the participant
- Total amount that has been claimed for services delivered
- Funds that are yet to be claimed for services already provided

Budget Timeline

Budget Timeline

Today (56.21% Plan Time Elapsed) ▼

Start Date
01/01/2019
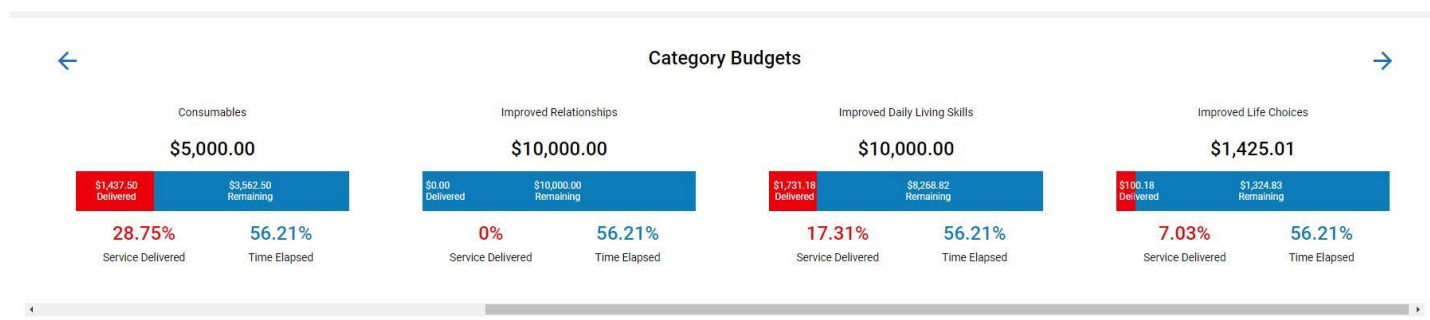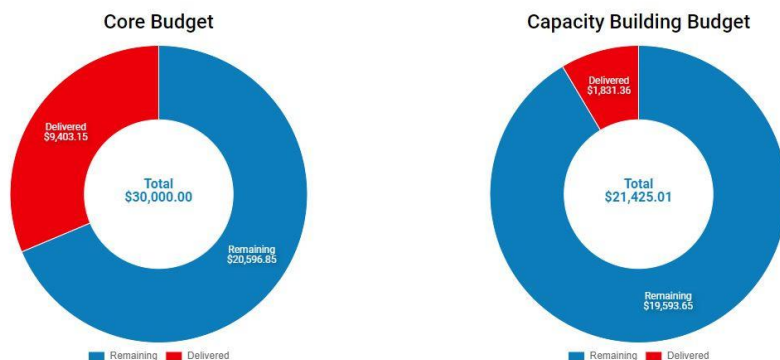
$11,234.51 (22.47%) Delivered
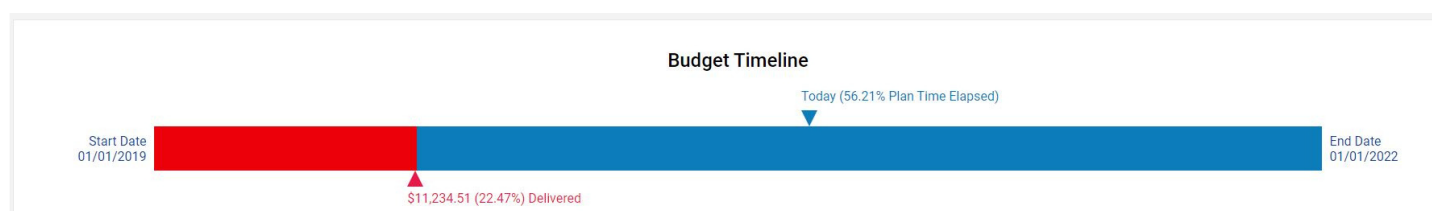
End Date
01/01/2022

Scrolling down, you will find the participant's Budget Timeline. At a quick glance you can see the start and end dates of their plan, how much of their budget has been claimed and how much is remaining.

What better way to monitor whether your participant's funding allocation is on track to last the length of the plan!

Category Budgets

Next, we offer a breakdown of funding delivered and remaining split into the categories within the plan.

A useful tool if you need to know whether there is enough funding for a new support, based on the category the service will be claimed from.

Core Budget

Delivered $9,403.15

Total $30,000.00

Remaining $20,596.85

■ Remaining ■ Delivered

Capacity Building Budget

Delivered $1,831.36

Total $21,425.01

Remaining $19,593.65

■ Remaining ■ Delivered

← **Category Budgets** →

Consumables	Improved Relationships	Improved Daily Living Skills	Improved Life Choices
$5,000.00	$10,000.00	$10,000.00	$1,425.01
$1,437.50 Delivered — $3,562.50 Remaining	$0.00 Delivered — $10,000.00 Remaining	$1,731.18 Delivered — $8,268.82 Remaining	$100.18 Delivered — $1,324.83 Remaining
28.75% Service Delivered — 56.21% Time Elapsed	0% Service Delivered — 56.21% Time Elapsed	17.31% Service Delivered — 56.21% Time Elapsed	7.03% Service Delivered — 56.21% Time Elapsed

Following, you will find Category Budgets. A general look into the service bookings in place based on the plan category the support is being claimed from.

This feature will show you whether your agreed upon service bookings are behind or ahead of schedule. This can be helpful in deciding whether you need to put additional funding into a service, or if there will be additional funds available within the service booking (if it's running ahead of schedule).

Clients Invoice

Need to check a provider has invoiced correctly or as per the service agreement?
Simply select the Client Invoices tab on the left-hand menu bar to bring up all the invoices received by Budgetnet for your participant.

Using the filters, you can search for all invoices from a particular provider or take a look at any declined invoices that are yet to be processed.

Budget Summary Report

Budget Summary Report
MICHAEL COYNE
Report Created: 09/09/2020

NDIS BUDGETNET
Client NDIS Number: 040533035
Plan Start Date: 01/01/2019   Plan Elapsed Time: 56.3%

	Total Budget	Delivered	Remaining	Unclaimed	Delivered %
Core	$30,000.00	$9,403.15	$20,596.85	$422.08	31.3%
Assistance with Daily Life	$20,000.00	$5,388.40	$14,611.60	$207.42	26.9%
Consumables	$5,000.00	$1,437.50	$3,562.50	$0.00	28.8%
Assistance with Social & Community Participation	$5,000.00	$2,577.25	$2,422.75	$214.66	51.5%
Capacity Building	$21,425.01	$1,831.36	$19,593.65	$0.00	8.5%
Improved Relationships	$10,000.00	$0.00	$10,000.00	$0.00	0.0%
Improved Life Choices	$1,425.01	$100.18	$1,324.83	$0.00	7.0%
Improved Daily Living Skills	$10,000.00	$1,731.18	$8,268.82	$0.00	17.3%

Another wonderful feature of the Support Coordinator Portal, and in fact our favourite option is the Budget Report.
Generate the report by clicking the green button on the top right-hand corner.
Our system will automatically generate a complete budget summary report, giving you all the information you need to have a concise understanding of your participants funding.

This resource is particularly useful for participant catch ups and NDIA review/planning meetings without adding the extra work to manually put these figures together.

Referrals

With our Support Coordinator Portal, we hope to make your life easier by offering your participant's budget breakdown whenever you need it.
Our team is available to answer your questions regarding current or perspective participants, contact us on 1300 402 568.

Should you have any participants who would benefit from our plan management service; visit budgetnet.com.au/referral, send us an email, or give us a call- we're here to help.