

Plan Manage Assist

Plan Management
across Australia



REGISTERED
NDIS
PROVIDER



WHO IS PLAN MANAGE ASSIST?



PMA is a financial intermediary which was founded by two families who are passionate about disability.

We are different from other providers in that we have first-hand experience and knowledge about the NDIS process, how it works and what the benefits are as we are carers for family members that have disabilities.

We understand the frustrations and the challenges participants, carers and support coordinators can go through.

We pride ourselves on the highly qualified and professional service that we provide which aligns with our passion and commitment to disability to ensure maximum outcomes for participants.



Our role at Plan Manage Assist?

1

Pay providers in a timely manner 4-7days

2

Help support coordinators keep track of participants funds (providing on demand budget reports)

3

Login live portal with access to expenditure by category, invoices etc

4

Ensure that onboarding a new participant is a seamless and easy process

Onboarding a new participant

Email or phone call to PMA

1

PMA sets up participant & sends login details with information regarding website & paying providers

2

3

Send alerts if budget is 75% spent & when plans are due to expire

4

5

Support coordinators send PMA Service Agreement & NDIS Plan

Provide participant & support coordinator with help & assistance with categories

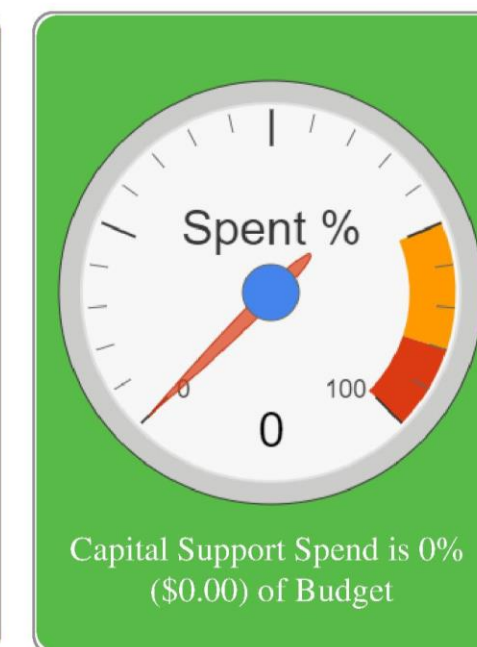
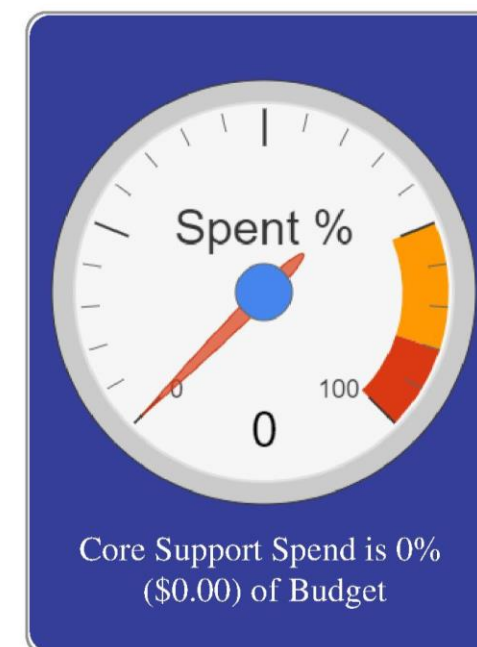
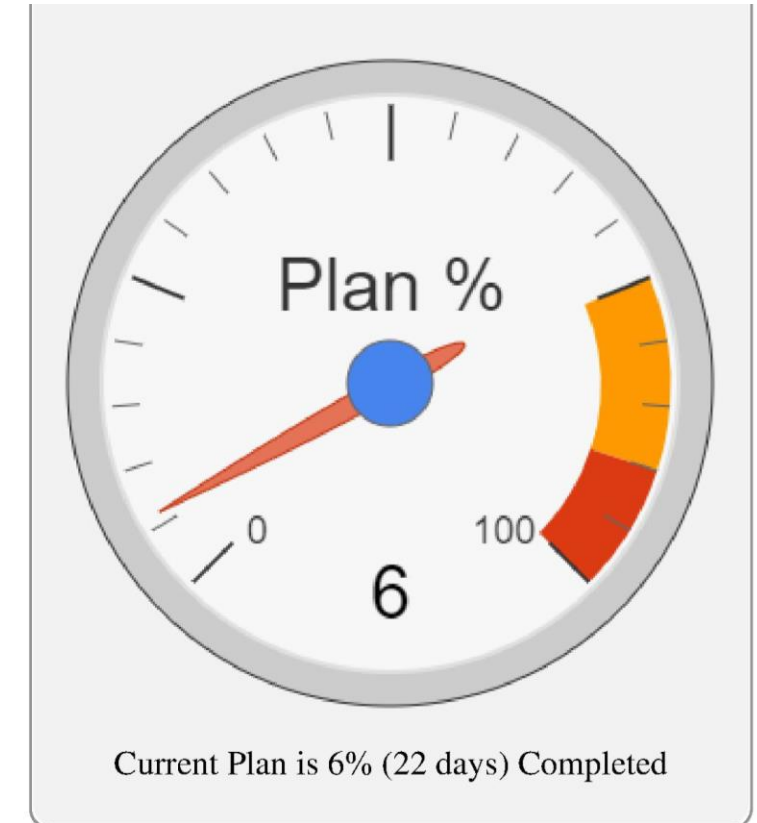
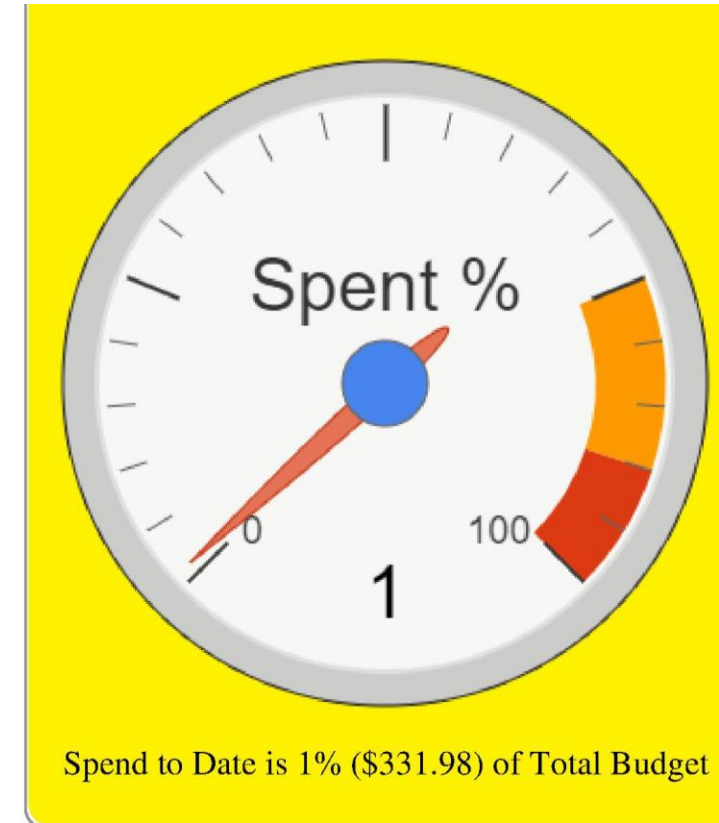
SNAPSHOT VIEW OF 2 REPORTS

Total Budget By Support Category Breakdown for XXXXXX

Core Supports						
	Support Category	Budget	NDIA Managed	Spend to Date	Left to Spend	%Spent
1	Assistance with daily life	\$9,000.00			\$9,000.00	0%
2	Transport		\$1,784.00			
3	Consumables	\$2,000.00			\$2,000.00	0%
4	Assistance with social and community participation	\$8,861.68			\$8,861.68	0%
Total \$		\$19,861.68	\$1,784.00		\$19,861.68	0%

Capital Supports						
	Support Category	Budget	NDIA Managed	Spend to Date	Left to Spend	%Spent
5	Assistive technology	\$2,609.45			\$2,609.45	0%
6	Home modifications	\$1,500.00			\$1,500.00	0%
Total \$		\$4,109.45			\$4,109.45	0%

Capacity Building Supports						
	Support Category	Budget	NDIA Managed	Spend to Date	Left to Spend	%Spent
7	Support Coordination		\$3,004.20			
8	Improved living arrangements					
9	Increased social and community participation	\$1,482.24			\$1,482.24	0%
10	Finding and keeping a job					
11	Improved relationships					
12	Improved health and wellbeing					
13	Improved learning					
14	Improved life choices	\$1,484.93		\$331.98	\$1,152.95	22%
15	Improved daily living skills	\$15,114.20			\$15,114.20	0%
Total \$		\$18,081.37	\$3,004.20	\$331.98	\$17,749.39	2%
TOTAL BUDGET \$		\$42,052.50	\$4,788.20	\$331.98	\$41,720.52	1%



WHY WE ARE DIFFERENT?

- ✓ We are carers that understand your needs
- ✓ We understand all aspects of the services we provide
- ✓ Managed by a CPA accounting practice
- ✓ We provide a quality service to participants and carers



OUR MISSION

- To provide high quality customer service and support to participants and carers



Our Aim

- Focus on quality
- Empower people with disabilities



Our Strengths

- We understand the processes as we are carers ourselves
- We consistently turnaround invoices within 7 days
- Highly qualified accounting and support staff



PLAN MANAGE ASSIST AWARDED THE
MOST OUTSTANDING FINANCIAL
INTERMEDIARY IN THE DISABILITY
SECTOR

"We are carers that understand your needs"



PMA Awarded "The Most Outstanding Financial Intermediary in the Disability Sector" in Australasia in 2019



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