



# Plan Management

## Contact details

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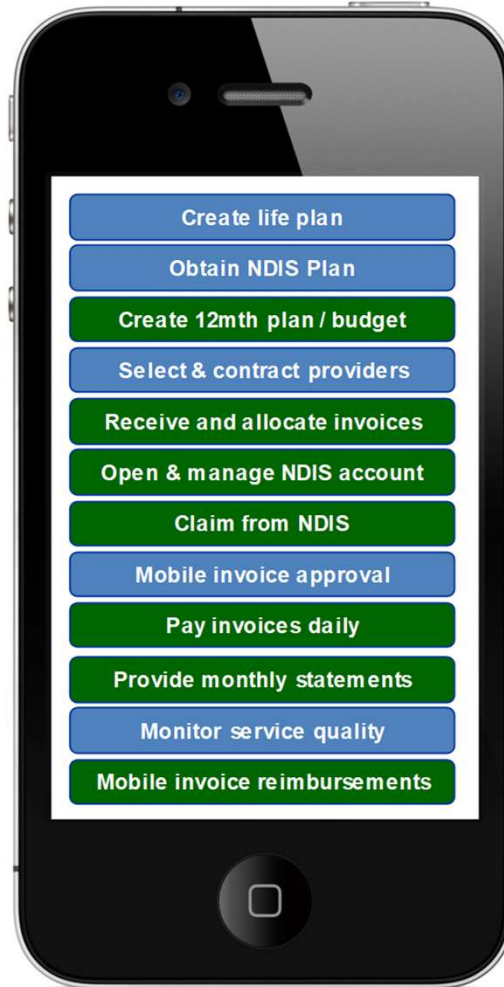
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# 1. Why Plan Management

*Plan Management generally needs to be requested, however, is the right to all NDIS Participants to enable choice and control over their purchase of goods and services.*

## Why would a NDIS care recipient choose a plan manager?

- + can choose any service provider with an ABN number that is from non-NDIS registered providers (like Jim's Mowing, and therapists who have chosen not to register).
- + don't have to use the NDIS Portal.
- + have a partner in navigating the NDIS
- + have most the choice and control of self management without the administrative burden.
- + have no choice with the need of a non-registered provider
- + have complexity in the NDIS plan, for example, young persons in a nursing home requiring personal contributions along with NDIS contributions to aged care facilities.
- + have another "friend" in the all important "circle of supports"



|   | SELF Managed                                      | PLAN Managed              | AGENCY (NDIA) Managed |
|---|---|---------------------------|-----------------------|
| Who is responsible for keeping records & organising paperwork?          | Participant                                       | ✓ Plan Manager            | NDIA                  |
| Who processes claims through the NDIS Portal?                           | Participant                                       | ✓ Plan Manager            | Provider              |
| Who pays my providers?  | Participant                                       | ✓ Plan Manager            | NDIA                  |
| Can I use registered providers?   | ✓ Yes   | ✓ Yes                     | ✓ Yes                 |
| Can I use non-registered providers?                                     | ✓ Yes   | ✓ Yes                     | ✗ No                  |
| Can I pay above the NDIS price guide?                                   | ✓ Yes   | ✗ No                      | ✗ No                  |
| Can I approve each payment from my plan to my providers?                | ✓ Yes   | ✓ Yes                     | ✗ No                  |
| Can I easily view my plan balances & invoices paid at any time?         | Depends on system used                            | ✓ Depends on Plan Manager | ✗ No                  |
| Is additional funding available if I choose to manage my plan this way? | ✗ No (however, "helper" can assist)               | ✓ Yes                     | ✗ No                  |
| Am I eligible   | Depends, NDIS can withhold ability to self-manage | ✓ Yes                     | ✓ Yes                 |



## 2. Why Capital Guardians

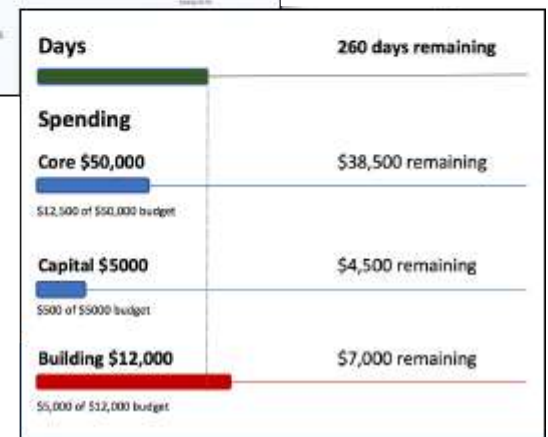
Capital Guardians has perfected an automated information technology system over ten years of doing plan management equivalent services in aged care. The system fully automated and integrated with thousands of Australian providers of goods and services to care recipients, has allowed Capital guardians to offer local Plan Management Representative to support clients locally.

### Customer Service

- + **Local client support**, with town and city based Plan Management Representatives
- + **Totally independent** of all other services, including Support Coordination
- + **Pay providers daily** after approval, software fully integrated with individual bank accounts, 48 hr pay turnaround
- + **Simple/quick invoice process** for the smallest (smart phone) to the largest Providers (email pdf)
- + Provider **real-time online plan tracking**
- + **Online reimbursements** via phone app
- + **We answer the phone!**, local contacts or via local landline numbers in every State
- + **Awesome clear statements**

### The only Plan Manager

- + with 10years+ experience as a unique provider of personal financial service to aged care client for Australia and New Zealand.
- + who has the backing of a Australian Financial Services Licence, along with the financial guarantees and independent trust account and auditor and is a member of Financial Ombudsman Service (consumer body)
- + Customer service by “locals”
- + receives and processes invoices (include pdf’s) from any accounting system or Capital Guardians smart phone app
- + offers real-time, online statements and approvals and expense tracking to budget.
- + 24/7 audit trail of budgets and their approvals, invoices senders, their approvals and payments; and
- + online search tool for local providers in same and adjacent suburbs
- + offers spending via our debit card, freedom of self-management without the administration

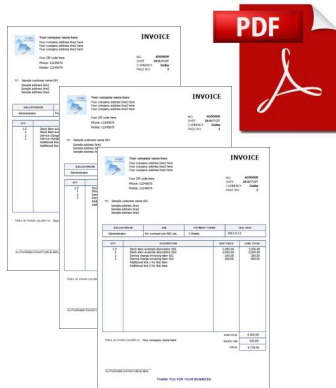


### 3. Providers invoicing

Automated with any accounting system via email pdf or direct (smart phone app), ensures immediate invoice approval to care recipient via email notification and NDIS claiming. Providers have their money within a couple of business days of invoicing.

## All providers of goods and services electronically invoice the specific account:

#### + Email pdf's



#### + Desktop or Smartphone

Invoice by Community

--Select Community--

Business Address and Contact Details and Logo

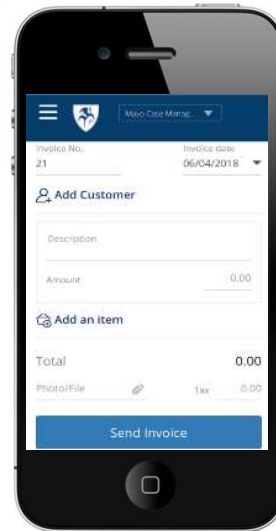
Invoice Number  
# Generate Invoice #

Invoice Date  
18/04/2018

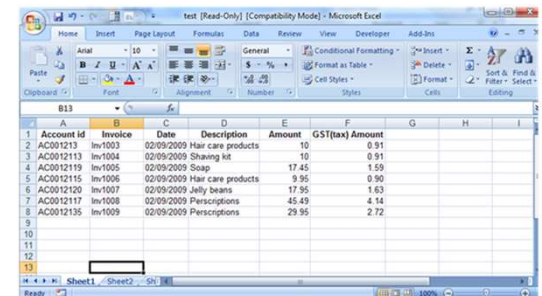
Description

⊕ Add an Item

Choose File Browse



#### + Direct spreadsheet upload



| Account Id | Invoice | Date       | Description        | Amount | GST(tax) Amount |
|------------|---------|------------|--------------------|--------|-----------------|
| AC0012113  | Inv1003 | 02/09/2009 | Hair care products | 10     | 0.91            |
| AC0012113  | Inv1004 | 02/09/2009 | Shaving kit        | 10     | 0.91            |
| AC0012119  | Inv1005 | 02/09/2009 | Soap               | 17.45  | 1.59            |
| AC0012115  | Inv1006 | 02/09/2009 | Hair care products | 9.95   | 0.90            |
| AC0012120  | Inv1007 | 02/09/2009 | Jelly beans        | 17.95  | 1.63            |
| AC0012117  | Inv1008 | 02/09/2009 | Prescriptions      | 45.49  | 4.14            |
| AC0012139  | Inv1009 | 02/09/2009 | Prescriptions      | 29.95  | 2.72            |

## 4. Capital Guardians Existing Payment Partners

Capital Guardians pay thousands of providers in the care industry all over Australia.

Below is a snapshot of providers we pay in Melbourne, the brand is very strong in many regional areas, and many providers get paid for both disability and aged care.

Capital Guardians provide the software to hundreds of aged care organisations. Looking after the personal spending of Residential Care clients and all financial management for government funded home care package clients.



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