A quick and easy way to view your budget, track spending and review invoices

MYP Dashboard

PARTICIPANT

your plan
MANAGER
AN aXesto FOUNDING MEMBER

Dashboard Overview

We've found that being transparent, is key when handling NDIS Plans. It helps to keep us accountable and lets you know what's left to work with in your budget.

The MYP Dashboard is a central location where you can view:

Plan Budget

Spending vs Budget Graph

Invoices Awaiting Approval

Service Agreement Budget

Documents

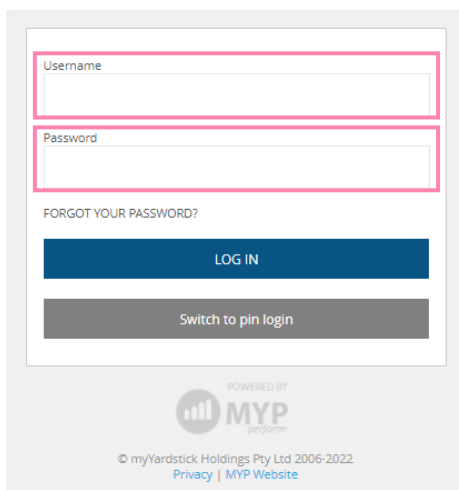Scheduled Changes

Expired Engagements

Schedules of Support

your plan MANAGER

Getting Started

If you wish to have access to your dashboard, please email:
yourteam@ypm.com.au

Login Details

Once completed an email will be sent to you from **info@mypcorp.com** that will contain your login details (username and password). Please check your "Junk Folder" if you have not received the email.

STEP 1.
Click on the link in the email. It will take you through to the MYP main login page.
https://global.mypcorp.com/Login/

STEP 2.
Enter the username and password listed in the email, into the login page.

STEP 3.
Set up your security question.

STEP 4.
You are now be logged into the YPM Dashboard.

IMPORTANT: INITIAL DASHBOARD SETUP MUST BE COMPLETED ON A DESKTOP COMPUTER (NOT A MOBILE DEVICE).

HAVING TROUBLE? Reach out to our Team via phone or email and they will be able to manually resend your login details. Access can be arranged for Parents and Guardians, just ask us how.

MYP Shortcut "App"

For Apple iPhone & Android mobile devices.

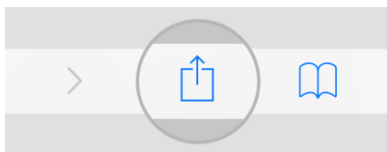## Apple iPhone

STEP 1.
Launch **Safari**

STEP 2.
Navigate to **www.ypm.com.au**

STEP 3.
Select the three (3) lines on the righthand side and click "**Dashboard**"

STEP 4.
Tap the "**Share**" button.

STEP 5.
Select "**Add To Home Screen**"

STEP 6.
Name the shortcut "**My Dashboard**"

STEP 7.
The MYP "**My Dashboard**" icon should now display on your home screen.

HAVING TROUBLE? Reach out to our Team via phone or email and they will be able to talk you through the process of adding a My Dashboard "App" to your mobile device.

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MYP Shortcut "App"

For Apple iPhone & Android mobile devices.

Android

STEP 1.
Launch **Chrome** for Android

STEP 2.
Navigate to **www.ypm.com.au**

STEP 3.
Select the three (3) lines on the righthand side and click "**Dashboard**"

STEP 4.
Tap the "**Menu**" button.

STEP 5.
Select "**Add To Home Screen**"

STEP 6.
Name the shortcut "**My Dashboard**"

STEP 7.
The MYP "**My Dashboard**" icon should now display on your home screen.

HAVING TROUBLE? Reach out to our Team via phone or email and they will be able to talk you through the process of adding a My Dashboard "App" to your mobile device.

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Plan Budget

The Plan Budget section is a summary of approved support categories. It shows your **Total Allocated Budget** against your **Unallocated Budget**. Expand each category by clicking on the arrow to view all related invoices / claims.

PLAN BUDGET							
SUPPORT PURPOSE	SUPPORT CATEGORY	MANAGEMENT TYPE	BUDGET	SPENT	PENDING	BALANCE	
Capacity Building	Improved daily living skills	Plan	$31,778.96	$12,624.60	$0.00	$19,154.36	▼
Capacity Building	Improved life choices (14_033_0127_8_3: Plan Management And Financial Capacity Building - Set Up Costs) - 19 Mar 2021 to 19 Mar 2023	Agency	$232.35	$232.35	$0.00	$0.00	▼
Capacity Building	Improved life choices (14_034_0127_8_3: Plan Management - Financial Administration) - 19 Mar 2021 to 19 Mar 2023	Agency	$2,506.80	$1,044.50	$104.45	$1,357.85	▼
Capital	Assistive technology	Plan	$5,000.00	$575.00	$0.00	$4,425.00	▼
Core	Assistance with daily life (includes Supported Independent Living)	Plan	$116,012.16	$43,822.41	$0.00	$72,189.75	▼
Core	Assistance with social and community participation	Plan	$57,688.80	$13,049.61	$0.00	$44,639.19	▼
Core	Consumables	Plan	$15,800.00	$14,016.84	$0.00	$1,783.16	▼

Each approved category shows the Budget, Spent, Pending and Balance.
By clicking the download button, it will show the claim YPM have created.
These are submitted to the NDIA.

SUPPORT PURPOSE	SUPPORT CATEGORY	MANAGEMENT TYPE	BUDGET	SPENT	PENDING	BALANCE	
Capacity Building	Improved daily living skills	Plan	$31,778.96	$12,624.60	$0.00	$19,154.36	▲
INVOICE/CLAIM DETAILS							

| INVOICE/CLAIM #	PROVIDER	REF #	DATE	PERIOD	AMOUNT	TOTAL	
YPM281804	Test Provider 1	INV006280	18 Jan 2022	13 Jan 2022 to 13 Jan 2022	$190.00	$190.00	🔽
YPM281254	Test Provider 2	INV017510	17 Jan 2022	11 Jan 2022 to 11 Jan 2022	$258.65	$258.65	🔽

NOTE: This is not where you review and approve invoices. This section strictly links the claims with the corresponding category. **If you'd like to learn more about reviewing, approving and rejecting invoices**

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Spending vs Budget Graph

This graph is a visual representation of your Plan Budget. It breaks down each phase into the following categories:

- **Budget** (Green)
- **Spent** (Blue)
- **Pending** (Red) and
- **Balance** (Orange).

SPENDING VS BUDGET
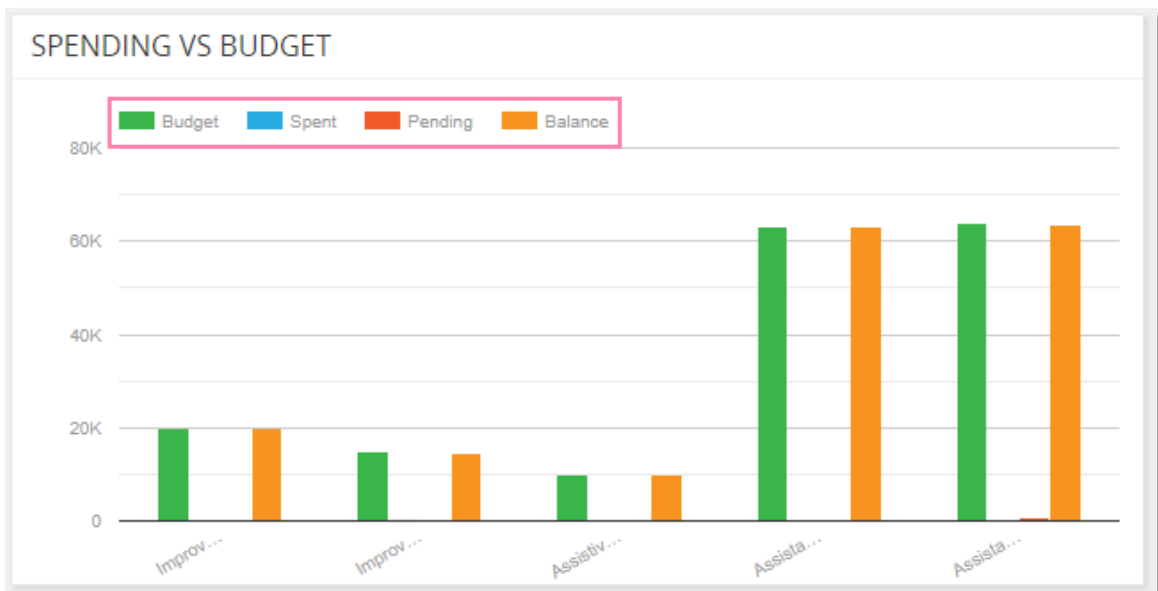
The option to select a pie graph to view information if also available depending on preference.

Listed vertically on the left side are staggered amounts in dollars ($).
Listed horizontally along the bottom are your approved support categories.

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Invoices Awaiting Approval

Reviewing, approving and rejecting invoices is a Participant's choice. You can opt out if you wish and let Your Plan Manager do the work or you can approve selected invoices, add notes for us to see and reject invoices if there is a discrepancy.

When you choose to opt in, please note that invoices will be automatically approved overnight from when they were uploaded by our Provider Payments Team, and it will automatically go through to the next phase of claiming.

TIP: To view all invoices awaiting approval click on "**Invoices awaiting approval (multi-clients)**" and the section will expand.

The "**Pause**" button allows you to hold the claim with a note that our Client Services Team will review and follow up on.

Provider Service Agreement Budget

A detailed view, showing your chosen providers, the category they're charging to, and the amount spent. This is where our Plan Managers view and keep track of each category in detail.

PROVIDER SERVICE AGREEMENT BUDGET

PROVIDER	SUPPORT PURPOSE	SUPPORT CATEGORY	MANAGEMENT TYPE	BUDGET	SPENT	PENDING	BALANCE	
Test Provider 1	Core	Assistance with daily life (includes Supported Independent Living)	Plan	N/A	$326.65	$0.00	N/A	▼
Test Provider 2	Capacity Building	Improved daily living skills	Plan	N/A	$1,240.00	$0.00	N/A	▼
Test Provider 4	Core	Consumables	Plan	N/A	$59.95	$0.00	N/A	▼

PROVIDER SERVICE AGREEMENT BUDGET

UNALLOCATED PROVIDER BUDGETS

SUPPORT CATEGORY	TOTAL BUDGET	UNALLOCATED BUDGET
Improved life choices	$2,503.20	$2,503.20
Improved life choices	$464.06	$464.06
Improved daily living skills	$16,332.94	$16,332.94
Consumables	$13,535.75	$13,535.75
Assistance with daily life (includes Supported Independent Living)	$51,000.56	$38,801.36
Assistance with social and community participation	$76,589.56	$43,391.16
Support Coordination	$16,607.28	$15,605.88

TIP: To view your unallocated budget, click on the blue "eye" icon.

NOTE: Pending invoices will show up here as well, with funds showing in the "Pending" column. Funds will then move to "Spent" once approved.

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Documents

Here you will find several different documents and records that directly relate to your time with Your Plan Manager. Service Agreements, your NDIS Plan and other related documentation will be stored within the "Documents" section. Most of the files in this section are .pdf files.

If you have more than one page of documents, scroll between them using the "Next Page" and "Last Page" buttons in the grey panel at the bottom of the section.

TIP: Files can be downloaded by clicking the blue "Download" icon.

Scheduled Changes

This section is designed to track changes to your nominated providers. **What is a Scheduled Change?** It's basically a way of logging when you want to end a Service Agreement with a particular provider or if that provider is being monitored by the NDIS for some reason.

STEP 1
Click on the blue "Plus" symbol and the following fields will appear.

STEP 2
Enter in all relevant dates and details into the fields provided

STEP 3
Click "Save"
TIP: If for any reason you don't want to lodge the scheduled change, click "Cancel".

NOTE: If you prefer to call or email us with your scheduled change, please do not hesitate to reach out. We will then enter the scheduled change into the MYP Dashboard on our end for you to view.

Expired Engagements

All expired Service Agreements with will appear here. It's a good way to keep track and view previous versions. It shows your old plan Start and End date as well as the Booking Start and End Date.

EXPIRED CLIENT ENGAGEMENTS

PLAN START DATE	PLAN END DATE	BOOKING START DATE	BOOKING END DATE
28 Jun 2019	17 May 2020	01 Jul 2019	17 May 2020

NOTE: If you need further information regarding an old Service Agreement that is not listed on the Dashboard or wish to clarify some information, please reach out to our Team.

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Schedules of Support

Outlines the Support Category that Your Plan Manager (YPM) will be charging to based on your NDIS Plan and Service Agreement.
Schedules of Support outlines the following:

- Price Book
- Product
- Ratio
- Rate
- Unit of Measure
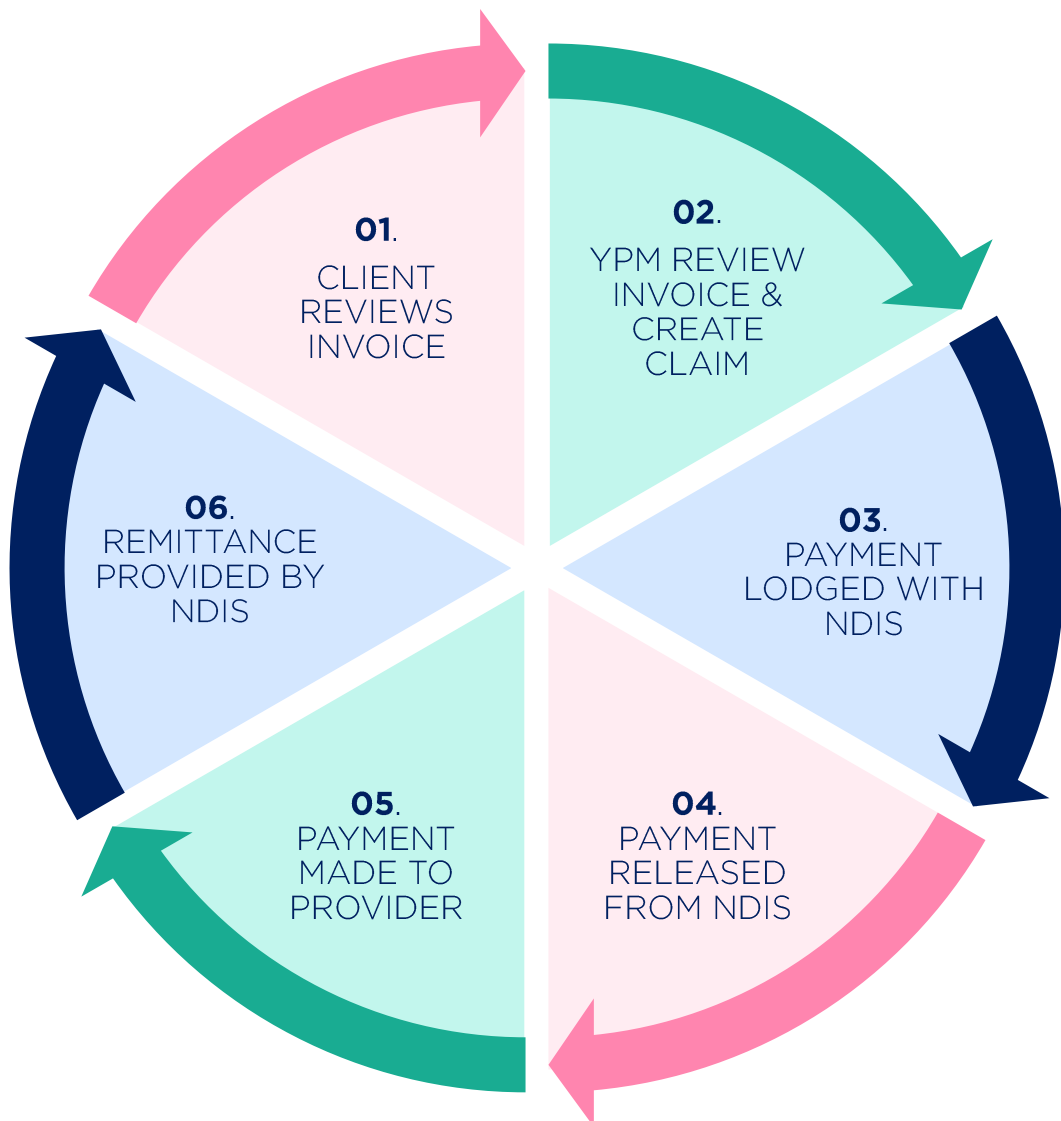
- Units
- Frequency
- Fee (fixed price charge)
- FFS (fee-for-Service

The image has been cut for the purposes of this manual; information will be in one panel at the bottom of your MYP Dashboard.

NOTE: The Schedule of Support Total will vary from client to client depending on what has been allocated to you within your NDIS Plan.
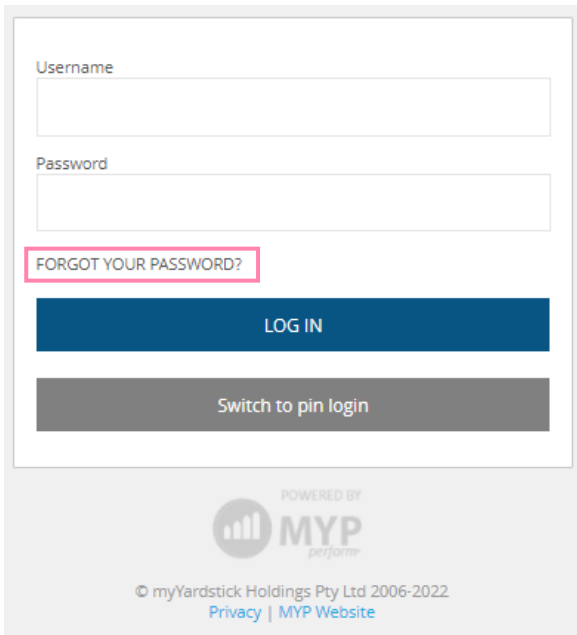
Payment Lifecycle

To better understand the various stages of our payment cycle. We've broken down the different stages into bite size pieces (we do love a good pie *chart).

01. CLIENT REVIEWS INVOICE

02. YPM REVIEW INVOICE & CREATE CLAIM

03. PAYMENT LODGED WITH NDIS

04. PAYMENT RELEASED FROM NDIS

05. PAYMENT MADE TO PROVIDER

06. REMITTANCE PROVIDED BY NDIS

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Password Reset

Forgotten your password? We get it! Simply click the "Forgot Your Password" link on the login page, enter your Username Email Address and follow the prompts.
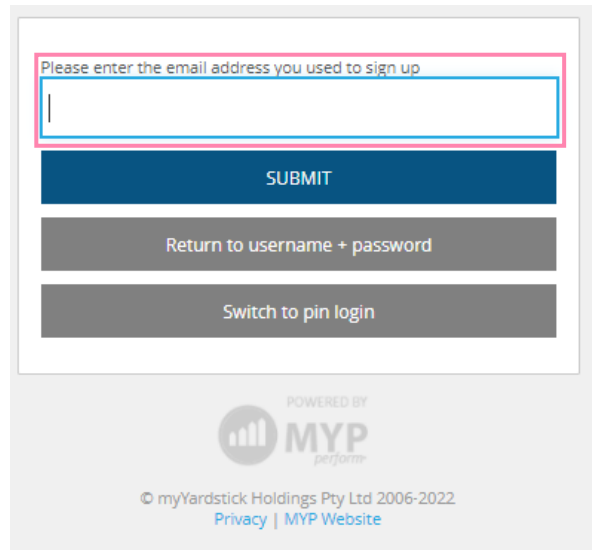

NOTE: If you need to reset the entire login, please reach out to us via phone or email and we will guide you through it.

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P: 1800 YOUR PLAN (1800 968 775)
E: plan@ypm.com.au
W: www.ypm.com.au

Thank you.

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