

Your Plan Manager Services Guide.





Director's Note.

Welcome!

Thanks so much for choosing to join or switch to Your Plan Manager. We are a family owned and operated business. Our service to you matters. And we're not the same as other Plan Management service providers.

Why? Because I have family members in the scheme. I directly understand the need for fast, efficient and friendly service. And your providers are our clients, just like you are.

Our service has many team members with lived experience with disability, from diverse indigenous and cultural backgrounds, carers and other people who understand and support you and your team on your NDIS journey.

Our focus is to make our role as simple as possible in a world of forms, appointments and complications. To support you and your team with great service and a friendly smile. Nothing is too much trouble. And we LOVE feedback!

When you sign up with Your Plan Manager, we need to cover a lot of responsibilities. If you need help to complete any of our forms, need an easy read version or want to ask any questions, please provide us with your details and we will get in touch to support you through this part of the process.

If you ever have any feedback or suggestions on ways to improve, we love to do better so please let us know.

Have a wonderful day.



Your Sincerely,
Tanya Walford & the YPM Team



Table of Contents

Director’s Note.....	03
Welcome.....	09
The YPM Team.....	12
Our Mission.....	15
Our Values.....	17
Testimonials.....	18
Dashboard.....	20
YPM4GOOD.....	23
Contact Us.....	27

**Welcome,
We're so
glad you're
here.**





We are your dedicated Plan Management Team.

Our role is to pay your providers and to support you with general advice, on how to spend your funds and work within the NDIS guidelines.

We'll email you an electronic service agreement for your records shortly.





About Plan Management.

Plan Management – Financial Administration funding applies to registered providers who undertake financial administration of a plan on behalf of a Participant. Plan Management funding includes a setup fee to establish the payment arrangements with providers and a monthly processing fee.

This support assists a participant by:

1. Providing increased control over plan implementation and utilisation with plan financial intermediary services.
2. Managing and monitoring budgets over the course of the plan.
3. Managing NDIS claims and paying providers for delivered service.
4. Maintaining records and providing regular statements showing the financial position of the plan.
5. Provide access to a wider range of service providers, including non-registered providers whilst remaining in line with the price limits contained within the Price Guide.
6. This does not include out of hours or weekend support
7. Evidence is required for everyday items; our decision-making form will need to be completed as evidence of choice and control.
8. Provide you with access to support and coaching to help you maximise your NDIS Plan.

You can read the [NDIS Guide to Plan Management](#) for more information about our role.

NOTE: These costs do not come out of your funding. The NDIS pays for these supports separately.



The YPM Team.

The YPM office is full of thinkers and doers.

Always ready to bring our NDIS Client's and Providers the best outcomes possible. With fast fingers and big hearts, we're passionate and dedicated individuals, united by our company values and driven to make a difference.

Our experienced Plan Mentors have been carefully chosen to break down the NDIS guidelines and aim to be a valued part of your team. They'll lend a kind ear, a friendly smile and will always be in your corner, cheering you on.

Known for their quality banter, meetings and GIF exchanges, our Provider Services Team know the NDIS Price Guide inside and out. Forever streamlining YPM processes and our CRM interface for faster outcomes and prompt payments.



Our Mission.

To deliver innovative, thoughtful capacity building and person centred solutions, to people with a disability and their support teams.



Our Values.

Collaboration

We are in this together. We believe in the strength of teamwork. We value generosity and inclusion. When we work together and give our ideas and support freely, we are more creative, innovative, and daring. We consider ourselves part of your team.

Leadership

We strive to be better. This means we are always looking for ways to improve what we do. We will always go the extra mile to achieve a brilliant outcome. We are leaders in setting quality standards. Good enough is not enough for us!

Integrity

We are honest. To us integrity means being open and transparent about what we do and why we do it. If we make a mistake, we will own it and fix it. We will also put changes in place to ensure the mistake doesn't happen again.

People

Everyone deserves a voice and a place to belong. We believe you have the right to have a say in what affects you. We believe you should be heard and included. We celebrate different voices and opinions because they make our business better.

Service

We believe in the value of exceptional service. This means a warm welcome and a cheerful response from us every time. We value your time by doing things simply and efficiently. We always strive to get it right the first time and if we don't, we use your feedback to get it right the next time.





Investment
Value at Year
end

339 970	373 967
56 969	804 029
817	1 296 731
58	1 859 317
6	2 499 808
	3 227 076
	4 050 935
	R 28 331

Start
Cov

Provider Payments.

If you choose to sign up with Your Plan Manager Our provider payment terms are between 5-7 business days.

Once you're onboarded by our Plan Support Team we'll be ready to begin making payments to your chosen team of providers.

Please have providers send all invoices to accounts@ypm.com.au

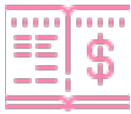
Our system has a function that allows clients to approve provider invoices before payment.

If you would like to approve invoices, please let our team know.

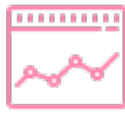


Dashboard Overview.

The YPM Dashboard is a quick and easy way to view your budget, track spending and review invoices. 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.



Plan Budget



Spending vs Budget Graph



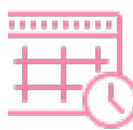
Invoices Awaiting Approval



Service Agreement Budget



Documents



Scheduled Changes



Expired Engagements



Schedules of Support





YPM4GOOD.

We're passionate about giving back.
That's why we started YPM4GOOD.

When you sign with us, we donate a portion
of your fees towards a charity. Our team
member of the month chooses which one!

Testimonials.

“Your Plan Manager are innovative and keep up with current changes. They keep their skills and education up to date on what is happening in the NDIS. They have a great understanding on what you can and cannot spend your funding on and will go above and beyond to assist. They are quick responders and nothing is ever too much trouble”.

- Amanda, Mandatory Care Services

“I find working with Your Plan Manager is such a great partnership. They are very well informed on the NDIS and always willing to share their expertise to ensure that people have a good understanding of their plan and how best to use their funds”.

- Annette, Nexus Support Services

“The staff at YPM are incredible. YPM have a team of trained and qualified staff who assist us daily. Special mention to Alison - She makes herself available more often than I am sure she needs to and always goes above and beyond, your whole team does. THANKYOU!!”

- Alysa, Hunter Valley Supports

“Thanks so much for being on to it, I really appreciate your ongoing support and communication with me, it validates and reassures my anxiety. You’re amazing at what you do”.

- Hayley, Client

“The difference between you & my old plan manager is simply night & day ...just keep doing what you are doing please & people will continue to send people your way”

- Marcus, Client

**Let's walk
this road
together,
shall we?**



How To Get In Touch.

While our head office is in Tweed Heads, NSW we are a national NDIS Registered Plan Management company and work with people in all states and territories of Australia-wide.

If you have any questions about the services we offer, our sign up process, or how we can assist you to get the most out of your NDIS funding, please don't hesitate to contact us. One of our helpful team members will respond as soon as possible.

PHONE:

1800 968 775

EMAIL/HELP WITH SIGNING UP:

plan@ypm.com.au

INVOICES:

accounts@ypm.com.au

PROVIDER ENQUIRIES:

payments@ypm.com.au

GENERAL FEEDBACK OR COMPLAINTS:

feedback@ypm.com.au

VISIT US:

HQ: 9A, 24 Corporation Circuit, Tweed Heads South, NSW 2486

MAIL US:

PO BOX 6323, Tweed Heads South, NSW 2486

ABN: 68 603 270 613 [Your Plan Management Pty Ltd].

NDIS REGISTERED PROVIDER: 4050 026 967



