

# Your new Plan Tracker Portal

## Support Coordinators



Access to plan and spending details for all your participants plan managed by us



## Welcome to your Portal

Your Support Coordinator Portal gives you complete visibility over your participants' plans and budgets, so you can manage everything from one central place.

### My participants

3

Participants

0

New plans

1

Plans ending soon

1

Birthdays

The number of Plan Tracker participants assigned to you in the Portal

Any new plans that have been set up or renewed by us in the last 7 days

Plans ending in the next 90 days

Upcoming birthdays (for that extra personal touch)

Filter by 'plans ending soon' or 'new plans' to see which ones need your immediate attention



AA Aaron Armstrong  
Edit my profile →

- My participants
- Plans
- Our participants
- Add new participant
- Ask a question
- Help and resources
- Logout

### Participant list

Plans ending soon  New plans only  Upcoming birthdays

Search

Search participant details

Clear filters

Participant	Plan Duration	Status	
LT Lisa Turner NDIS Number 430870538	Day 48 of 730 <div><div style="width: 6%;">6%</div></div>	Active	View participant →
TW Thomas Williams NDIS Number 430278457	Day 129 of 730 <div><div style="width: 17%;">17%</div></div>	Active	View participant →
TR Timothy Robles NDIS Number 430064749	Day 175 of 189 <div><div style="width: 92%;">92%</div></div>	Plan Ending Soon	View participant →

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Chat with an Expert

# Your new Plan Tracker Portal Support Coordinators



Click on participant to see exactly what they see, so you can work with them to build their capacity.

How much your participant has available in relation to their plan

How much your participant has spent in relation to their plan

How much your participant has allocated to providers under their service agreements

A timeline to show how far your participant is into their plan - right down to the day

## Invoices

See all invoices processed with us and get detailed live statuses to explain where each invoice is in the processing cycle.

TW Thomas Williams

← Back to My Participants

- My Plan
- Invoices
- Providers
- Service agreements
- Reports
- Benefits
- Help and resources

### Thomas Williams

**Plan details**

- NDIS Number: 430278457
- State: Colorado
- Birthdate: Hover to view
- Current Plan: 26/10/2020 - 17/07/2024

**Contact details**

- Email
- Phone

Accessibility Menu (CTRL+U) X

▶ How UserWay Works

Oversized Widget OFF

Contrast +

Highlight Links

T T

← --- →

Cursor

Tooltips

Report a Problem USERWAY

Manage Accessibility by UserWay.org

See all the providers making claims against your participant's NDIS plan to easily resolve payment issues and have easy access to their contact details

Detailed reports on your participants' budgets, including what's being claimed by providers and the status of invoices

Adjust settings for the best experience through the accessibility menu