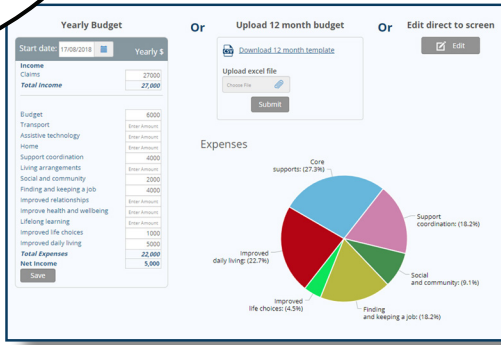


WHAT



CAPITAL GUARDIANS



ndis Plan

ANY PROVIDER WITH AN ABN



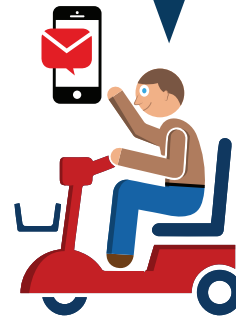
SPENDING

AGREED GOOD AND SERVICES

HOW

REGISTER AT
WWW.CAPITALGUARDIANS.COM
 OR REQUEST A FORM
CUSTOMER@CAPITALGUARDIANS.COM

APPROVAL (SMARTPHONE)



YOU



STATEMENTS & REPORTS



WHY

PAYS INVOICES QUICKLY!



NO PAPER



NO LOST INVOICES



TRACK SPENDING & APPROVAL (REALTIME)



FIND PROVIDERS & SERVICE BOOKINGS

WE ANSWER THE PHONE!

INSTRUCTIONS



CAPITAL GUARDIANS

1

LOG IN

LOGIN

WWW.CAPITALGUARDIANS.COM
 LOGIN WITH EMAIL ADDRESS
 AND PASSWORD ON MOBILE
 OR DESKTOP.



2



STATEMENT

VIEW LIVE TRANSACTIONS
 AND DOWNLOAD STATEMENTS.

Browyn Bishop - Statement

Date	Supplier	Description	#	Withdraw	Deposit	Balance	Doc
30/07/2018	Hastings Home Modifications		20000131	\$983.40		\$1,903.42	Approval
25/07/2018	Hastings Window Cleaning	Window cleaning - P/O 201807840	5956349	\$198.00		\$2,886.82	Approval
19/07/2018		Direct debit by Capital Guardians	992842		\$93.94	\$3,084.82	
18/07/2018	OPSM CLARENCE	Vogue frame #VOS152 - \$109.2	2	\$439.00		\$2,995.88	
14/07/2018	Mays Case Management	02/07/2018 - 15/07/2018	13636.A	\$90.00		\$3,429.88	
14/07/2018	Express Physio	02/07/2018 - 15/07/2018	13636.B	\$113.82		\$3,519.88	
14/07/2018	Mays face-to-face services	02/07/2018 - 15/07/2018	13636.C	\$418.75		\$3,633.70	
10/07/2018	Independence Australia Group	Consumable items	236248.C	\$71.95		\$4,052.45	
05/07/2018		Direct debit by Capital Guardians	97382		\$93.94	\$4,124.40	
02/07/2018	Mays Case Management	18/06/2018 - 01/07/2018	13636.A	\$90.00		\$4,030.46	

Withdrawals: Net Income 10.0%, Other 1.0%, Consumables 1.0%, Equipment 1.0%, Motor Vehicle 1.0%, Annual Health 1.0%, Transport 1.0%, Super 0.0%

Deposits: Other 1.0%, Government 99.0%

REPORTING
 TOOLS TO TRACK
 EXPENDITURES.



From: [] To: [] Search Show Last 10

Date	Supplier	Description	#	Withdraw	Deposit	Balance
30/07/2018	Hastings Home Modifications		SINV006161	\$983.40		\$1,903.42
25/07/2018	Hastings Window Cleaning	Window cleaning - P/O 201807840	5956349	\$198.00		\$2,886.82
19/07/2018		Direct debit by Capital Guardians	992842		\$93.94	\$3,084.82
18/07/2018	OPSM CLARENCE	Vogue frame #VOS152 - \$109.2	2	\$439.00		\$2,995.88

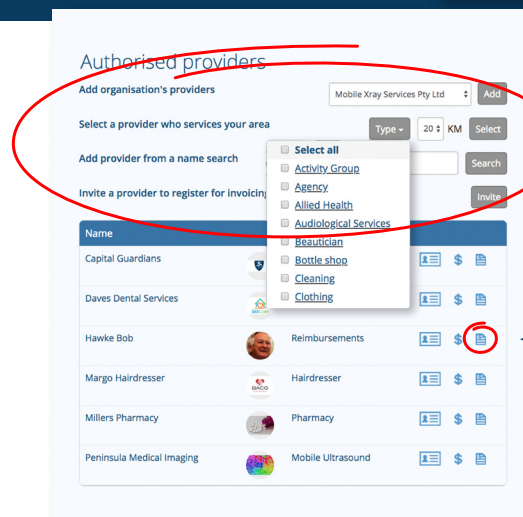
Days	260 days remaining
Spending	
Core \$50,000	\$38,500 remaining
\$12,500 of \$50,000 budget	
Capital \$5,000	\$4,500 remaining
\$500 of \$5,000 budget	
Building \$12,000	\$7,000 remaining
\$5,000 of \$12,000 budget	

3



PROVIDERS

COMMUNICATE DIRECTLY WITH
 SERVICE PROVIDERS REGARDING
 INVOICE DETAILS



SEARCH LOCAL
 PROVIDERS OR
 INVITE YOUR OWN.

CLAIM
 REIMBURSEMENTS



COMPLETED FORM TO BE FAXED TO (03) 8677 9255 or EMAIL customer@capitalguardians.com

<p>Participant _____</p> <p>Start date for package: _____ DOB _____</p> <p>Email* _____</p> <p>Home Address _____</p> <p>City _____ State _____ Postcode _____</p> <p>Telephone/s _____</p>	<p>Plan Management Costs</p> <ul style="list-style-type: none"> • CB Choice & Control – 14033012783 – Financial Intermediary setup costs \$222.85 • CB Choice & Control – 14034012783 – Financial Intermediary monthly processing at \$100.18 per month X 12 months.
<p>Representative name _____</p> <p>Email* _____</p> <p>Address _____</p> <p>City _____ State _____ Postcode _____</p> <p>Phone _____</p>	<p>If the Service Agreement is made by a Participant’s guardian, attorney, nominee or other representative (Representative), the Representative represents and warrants that it has full power and authority to enter into the Service Agreement on behalf of the Participant.</p> <p>Emails are required for online access to view statements.</p>

Capital guardians

- agrees to manage the funding of Supports* under the Participant’s Plan* that includes claiming payment from the NDIS and making payments to Providers;
- receive all invoices from vendors and ensures they are immediately represented in the account; and
- will communicate openly and honestly in a timely manner, treat the Participant with courtesy and respect, listen to the Participant’s feedback and resolve problems quickly; and protect the Participant’s privacy and confidential information.

Participant

- represents any claims entered into CG, and approved are entitled to be funded under the NDIS are true and correct and which have been provided in accordance with the NDIS Act, the NDIS Rules and all relevant Agency Guidelines;
- notify CG immediately if the Participant’s Plan or the relevant Plan Management Request is suspended, amended or replaced;
- regularly check CG statements online and approve all invoice for payment weekly and immediately notify CG of any errors or unauthorised transactions; and
- acknowledges that sole responsibility for the goods or services (including quality, suitability, fitness, merchantability, correspondence with any description or sample and accuracy for any purpose) which are paid for using CG lies with the individual or entity who has provided Supports*.

★ Signed	Name (Please Print)	Relationship	Date
_____	_____	_____	_____

Individual / Representative

p: 03 9005 5711 (Vic), 02 8005 5712 (NSW & ACT), 07 3012 5712 (QLD & NT); 08 9467 7372 (SA & WA)
fax (03) 8677 9255; e: customer@capitalguardians.com

* Defined under the NDIS Act