Case Study: PSR Plan Management

Transitioning Systems

PSR Plan Managers migrated to Planability to focus on scaling up their business. Their initial software was adequate while they were learning the ropes, but wasn't fit for the next stage in their journey. It was seeing the benefits of Planability's API integration and automation that won them over from the very start.

The transition between the two systems was easy, with guidance from the support team along the way.
"After the first week I was so glad I'd made the move. Planability uploaded all my clients for me, which saved me a lot of time. I extracted my information from my existing software in a CSV file and provided it to Planability."

The Planability Experience

PSR Plan Managers love so many of the Planability features that encourage clearer communication, seamless processing, and time-saving, and can't recommend it enough!
"I have one particular Plan Nominee who oversees seven NDIS plans. They have the one Planability login and can view all plans attached to them. Likewise with Support Coordinators, they too can view all participants linked to them."

The real-time claims platform provides live information, notifications, and streamlines administrative tasks such as adding Participants.
"Planability has built-in API's which means you very rarely have to log into PRODA. The system looks after everything for you. Everything in the system appears in real time. For example;
- *If a participant has gone for an unscheduled plan review and you aren't in the loop, Planability will send you a notification to advise a new plan is available.*
- *No more having to setup plans and budgets in your system, as Planability pulls these directly into the system from PRODA. I think it takes me 5mins to add a new participant to my program."*

PSR Plan Managers also appreciate that the support team go above and beyond to help with any issues.
"The team at Planability are very proactive and are constantly updating the system to ensure Plan Managers are getting the best outcomes they can. And if you ever have any questions or you think you've made an error, Emma in Support is such a sweetheart. She's been so helpful over the past 12mths and she's really knowledgeable with NDIS."

Productivity Savings

When it comes to productivity, PSR Plan Managers have seen the time-saving benefits of switching to Planability.

"I've just submitted 32 invoices in about 30mins, I'm really impressed with the bulk scanning feature. The time Planability has saved me is huge. I know of another Planability PM who manages over 200 participants all on her own without working more than 38hrs a week. There's so much that's automated it really does make this number of participants achievable."

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