



Case Study

S O J O E >
SUPPORTING OPPORTUNITIES



Situation

So Joe Plan Management turned to Planability in a difficult time. Having migrated their business to Lumary (with LanternPay) they had been using the platform for nine months when they were informed that Lumary were exiting the NDIS, and were forced to migrate to another platform.

Their experience in their next migration was problematic, involving an extended 12-week process and many frustrations along the way. These frustrations included heavy manual interventions for the team and many countless late nights trying to configure their system.

"We spent 12-weeks cleaning data and raising issues."

With support very slow to respond, the management team made the tough decision to investigate alternate providers and reached out to Credability Systems following a referral from a current Planability user.

"It was a very tough decision- the team was very concerned about attempting another migration...but following the Planability demonstration, we were confident enough to make the call to move again."

Support and Training

"Our sensitivity to a migration was heightened, because not only had we just completed one, it had been a really poor transition... so the fact that Planability handled it so well- we were incredibly grateful because we were already at a place of trauma... I can't sing the praises enough of how easy the transition was! We are now less than a month down the track and it's like "wow-that's fabulous"-we are cruising with it really."

"We were really impressed with how the support and training team sought to understand how we used our previous system and how we wanted to work with our processes now. This helped to clarify expectations and our needs for the system and gave us confidence in their ability to support our business."

"We achieved more in one week training than for the entire three months with the previous system."

"we love it when a plan comes together".

"The fact that you have options on how to communicate with the support team- with great responsiveness across all channels."

The Planability Platform Experience

"We are very comfortable in the consistency and the reliability of the system- we don't wake up in fear!"

"It is for plan managers- it has been built with the understanding of plan management, so although the process flow may look a little different, the process itself and the functionality that supports those processes is fantastic. Team feedback includes words like "Glorious" and "Superb"-I had staff that were very reluctant to go through another migration who turned around and said "Thank you so much for doing this! It's the first time I have been able to breathe in months!"

"We are growing quickly- so even though the volume of work has increased by 20-30% since moving across, we are still easily managing the additional volume...so the efficiencies are there... accuracy is better."

"Benefit for us is we can spend more time with participants— because the claiming process is so easy and so accurate! Planability gives us that peace of mind and control!"
"The ABA process only takes minutes, so it really is not a massive load! We have seen a massive reduction in load on our resources."

"Planability helped us to reflect on all our processes ...One thing we used to build into our tasks was our notifications... the fact that we get the email notifications to associated plan managers saves a lot of time."

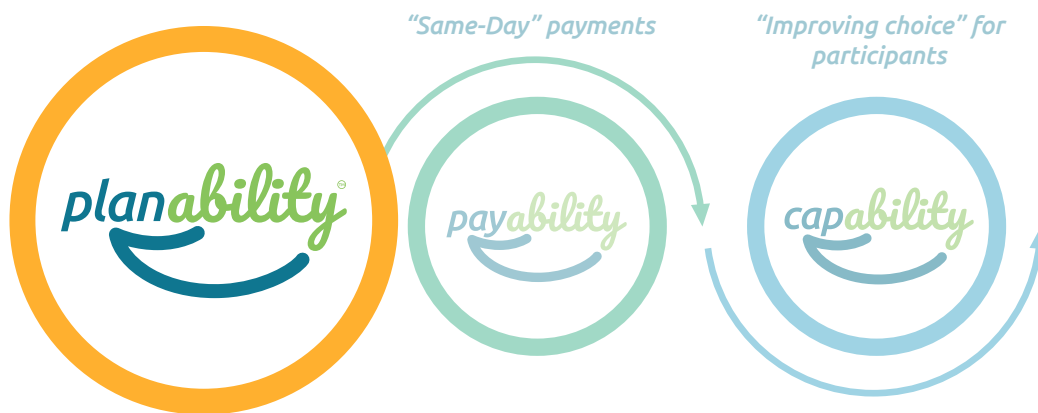
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Planability

“Real-Time” claims processing

“Real-Time” claims processing



Planability is our core offering, around which everything else is built!

Planability is designed for plan managers but the benefits from Planability flow both upstream to the service providers and supports coordinators and downstream to the participants and their carers!

Planability has been built from the ground up to leverage the real-time NDIS API's. Real-time claims processing is the key link, around which we are building our ecosystem.

Real-time processing takes the crazy out of invoice processing!!!

- “Live” feedback at data entry
- Immediate claims approval
- Automated remittance and payment processes
- No more batch uploads and payment reconciliations
- Spend 98% less time in PRODA
- One System, One Login
- Access accurate, “live” plan updates
- Reduce administrative overheads
- A future-proof solution for the NDIS PACE rollout!

Planability has been built for plan managers, with a clear philosophy: “To make plan management as simple as it should be!”

Take some time to see what we are so excited about!

Go on...Request a Demo to experience what plan management should be, and...

...Future-Proof your next investment!



“we love it when a plan comes together”.

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