



iOS App



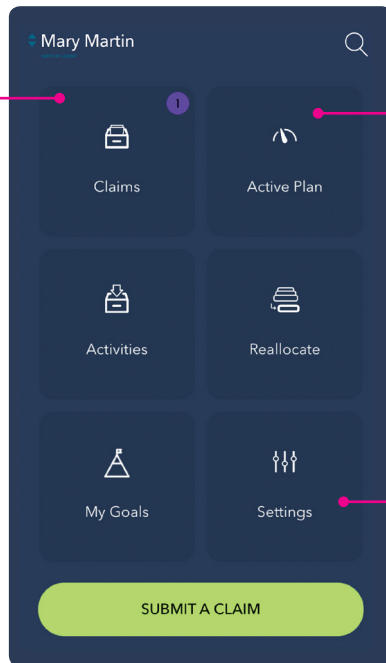
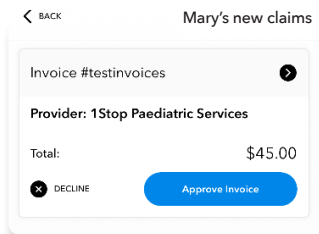
Android App



Viewing Claims and your Active Plan

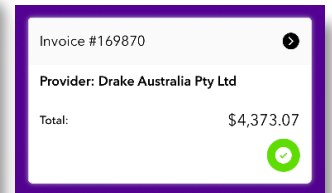
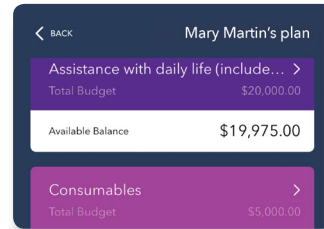
1. Claims

1 = Indicator for new Claims. Depending on your settings when you receive a new claim text from MPM or you notice the indicator on your app and you have : Auto-Approve **ON**, the claim will be processed without needing your action. If you have Auto Approve **OFF** you will need to **approve** or **decline** claim/s in the app for them to progress.



2. Active Plan

Scroll up and down to see your categories, the total and remaining budget for each category and the total remaining in your plan. Select categories and view your claims within each one.



3. Settings

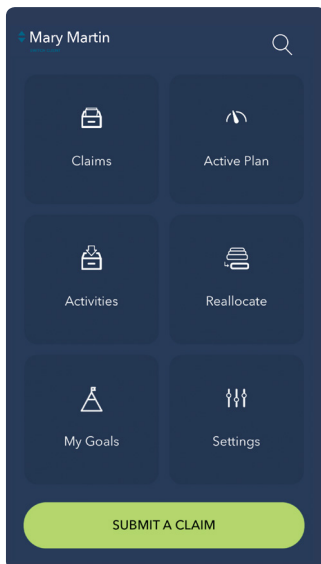
Change your Auto Approve option for new claims. Change your password or log out of the app.

Making Claims

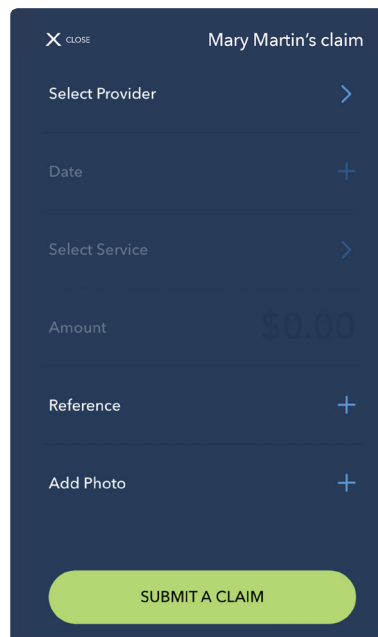
Invoices/Claims can be added anywhere in the app that you see :

SUBMIT CLAIM

ie on the landing screen, (as below) under Claims, Active Plan or within any category.



* Please note that on an Android device fields to fill will present one at a time.



Pay Me to be reimbursed for an invoice you have paid, **Pay Provider** to pay a provider for a service*

Date service/item provided

*Service/item provided

Total invoice \$ including cents

From the invoice, see below if not available/included. **

Take Photo of the invoice, or select from your **Photo Library**

Once all fields are filled **Submit Claim** will be enabled ***

Tips on making claims :

Select Provider/Select Service * : if the required provider/service does not appear please send the invoice to accounts@myplanmanager.com.au to load and add the provider/service. They will then become available in the phone app for you to claim for in the future.

Amount: Enter the total amount of the invoice including dollars and cents (if applicable).

Reference** : Include the invoice/reference no. from the invoice paperwork, if not available use the service date. ie the service was used on 23rd May 2018 reference = 23052018

Add photo : Take a photo of the invoice or select from your Photo Library if taken earlier.

Photo Tip: with multi-page invoices take one photo of all pages laid out side by side.

*** **Review and provide details in all fields if you cannot submit the invoice.**