

Careview Advantage User Guide

Logging In for the 1st Time

Your Plan Manager or Service Provider will need to give you access to login into the app. You will receive an email with your Username (which is the NDIS Number) as well as a password. You can use these login details to set a 4-digit PIN, which you then use to log into the app, following the instructions under **Setting Your Pin**.

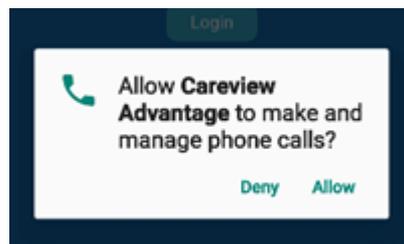
❗ **IMPORTANT:** Please ensure if prompted that you give the app the required permissions as detailed below otherwise you will not be able to register your account.

Device Permissions

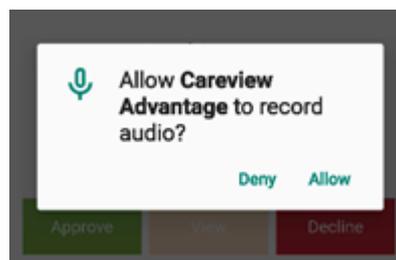
Careview Advantage needs access to your device for the following reasons;

- To store your 4-digit PIN, which you set the first time you log in.
- To receive notifications if your Plan Manager is using the Invoice feature. You need to allow this access in order to Approve and Reject Invoices.

📄 Please note Careview Advantage does not access or manage the calls you make from your Phone.



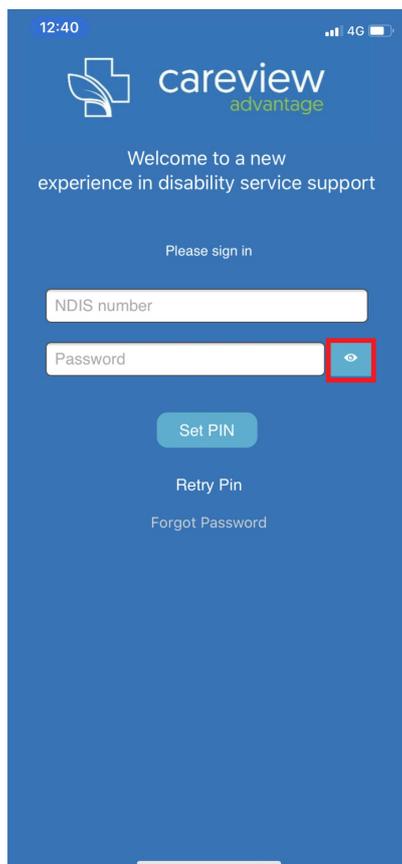
The Invoice feature also enables you to enter a decline reason using speech-to-text. You can decline this request if you do not wish to use speech-to-text.



Setting Your PIN

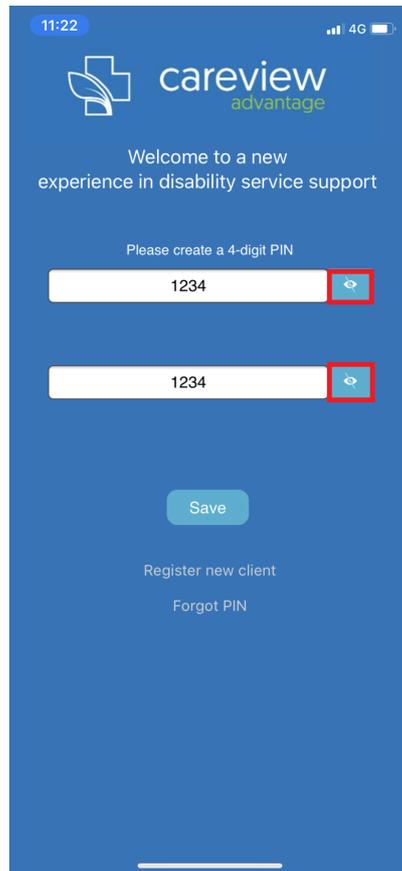
1. Tap to open the **Careview Advantage App** on your Phone.
2. From the **Please Sign In** screen, Enter your **NDIS Number**, Enter the **Password** provided in the Email and Tap on the **Set PIN** button.

💡 Click on the Reveal Password button to check before tapping on Set PIN

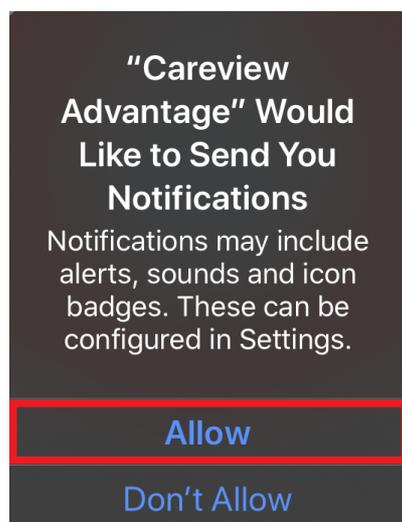


3. From the **“Please enter your PIN”** screen, please enter a 4-Digit PIN of your choice twice to confirm, and Tap on the **Save** button.

💡 Click on the Reveal PIN button to check before tapping on Save



 If you wish to receive notifications, please tap to select Allow when prompted.



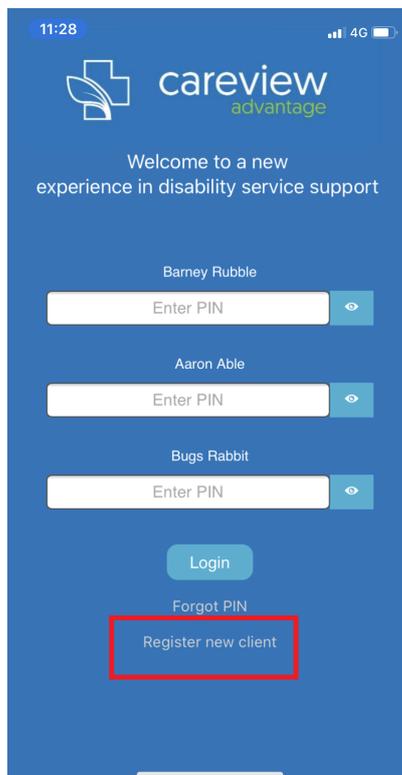
4. You will be automatically logged into the Advantage App.

 If you register the same account on another device you must use the same PIN number.

Register Multiple Users

You can register multiple accounts, such as if you have children that have NDIS funding that is being managed by a Plan Manager.

1. Tap to open the **Careview Advantage App** on your Phone.
2. From the Home screen, Tap on the **Register new client** link at the bottom of the screen.

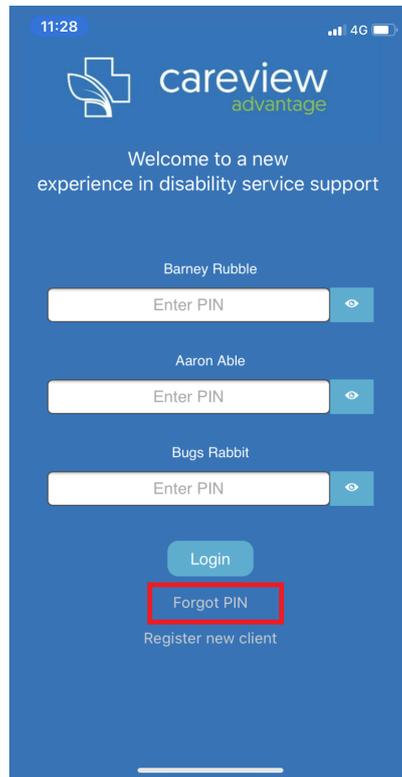


3. Follow the steps covered under “**Setting Your PIN**” (to set the 4-digit PIN for the account).
4. You will then see a new account added to the Home screen.

PIN Reset

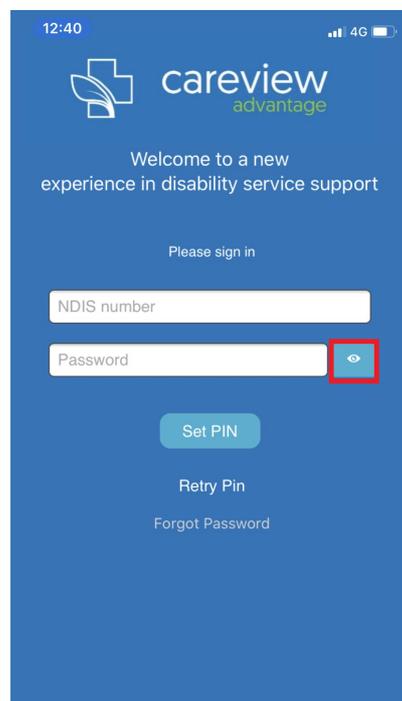
If you forget your PIN, please follow these steps to reset;

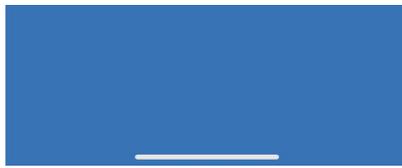
1. Tap **Forgot PIN**



2. Enter your **NDIS Number** and **password**.

 Enter password provided in the **Welcome Email**. If you no longer have access to the Password, please either press 'Forgot Password' or contact your Plan Manager and ask them to Reset your Password.





3. Tap **Set PIN** button.
4. Enter your 4-digit PIN and then reenter to confirm.
5. Tap **Save** button.

Using Careview Advantage

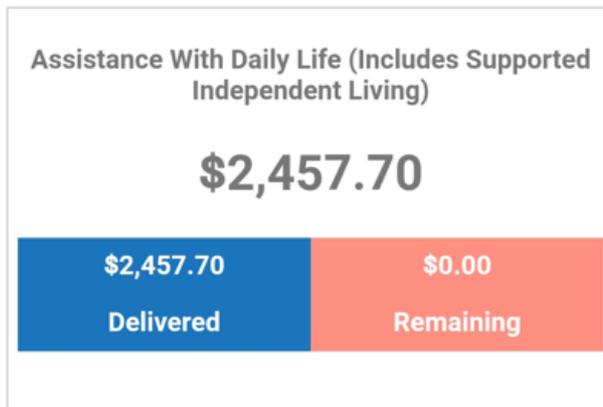
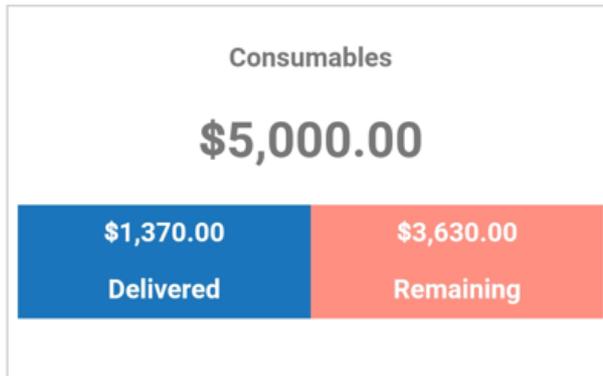
1. Once you have logged into Careview Advantage the overview of your plan will display



2. To view the exact breakdown of your category funding use the **Plan Budget** tab

Careview Support Services 

Funding |
 Plan Budget |
 Services |
 Summary



3. To view the Services within your plan use the **Services** tab

Careview Support Services 

Funding Plan Budget **Services** Summary



4. If required you can also view a overview of monthly funding use by selecting the **Summary** tab

Careview Support Services 

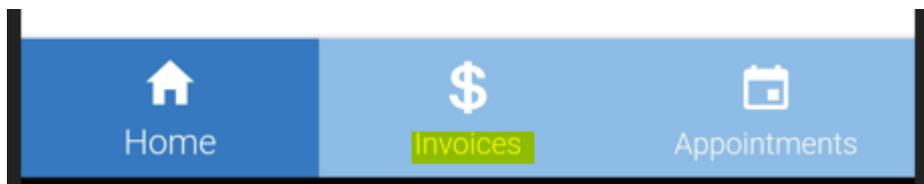
Funding Plan Budget Services **Summary**

Monthly Summaries

- September 2021
Service Hours Delivered: 6.00 Hours
Total Funding Claimed: \$550.70 →
- August 2021
Service Hours Delivered: 185.00 Hours
Total Funding Claimed: \$12,079.43 →
- July 2021
Service Hours Delivered: 11.91 Hours
Total Funding Claimed: \$683.27 →
- June 2021
Service Hours Delivered: 6.00 Hours
Total Funding Claimed: \$420.28 →
- May 2021
Service Hours Delivered: 10.00 Hours
Total Funding Claimed: \$493.00 →
- April 2021
Service Hours Delivered: 2.00 Hours ↘

① The **Services Hours Delivered** displayed for a month is the combined quantity among all delivered services (invoice lines) that are part of invoices which were created during that month and have been extracted / claimed.

5. If your organisation uses Advantage for invoicing approval and viewing. You can use the Invoices page to view past invoices or view pending invoices for approval



6. On the 'Approved' tab of the 'Invoices' page, a list of invoices will be shown which have been previously approved and have an invoice date within the month shown at the top of the page. You can change which month is shown, using the arrows on each side.

