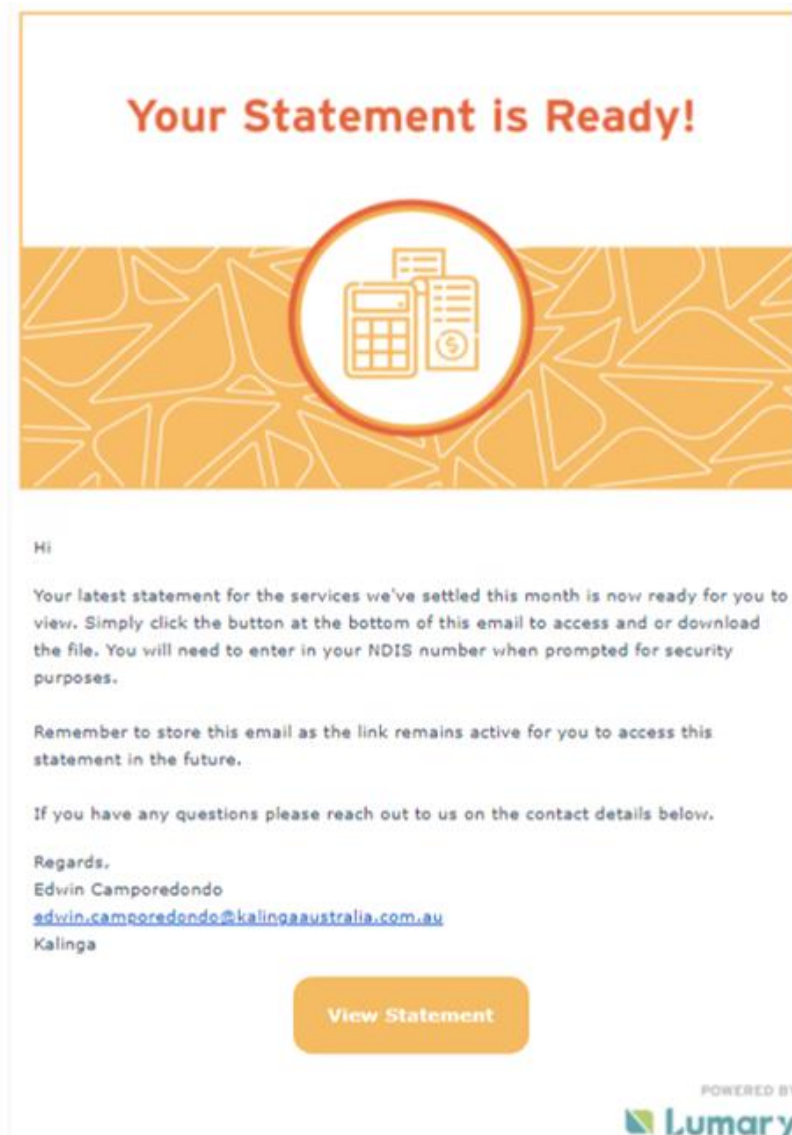


## How To: Access Monthly Transaction Reports

Kalinga Australia provides all our Plan Management clients with a monthly transaction report statement. This report allows all our clients to see what invoices were claimed during the period, the transaction details and how much money is remaining in the plan.

Below are 6 steps on how the monthly transaction report statement can be accessed.

1. Check your email on the first week every month. Transaction report statements are emailed to you from Lumary which is the payment platform that Kalinga Australia uses.
  - **“From: Plan Management Services <[noreply@lumary.com.au](mailto:noreply@lumary.com.au)>”**
2. Open the email.



3. Simply click on **'view statement'** on the email address.

Remember to store this email as the link remains active for you to access this statement in the future.

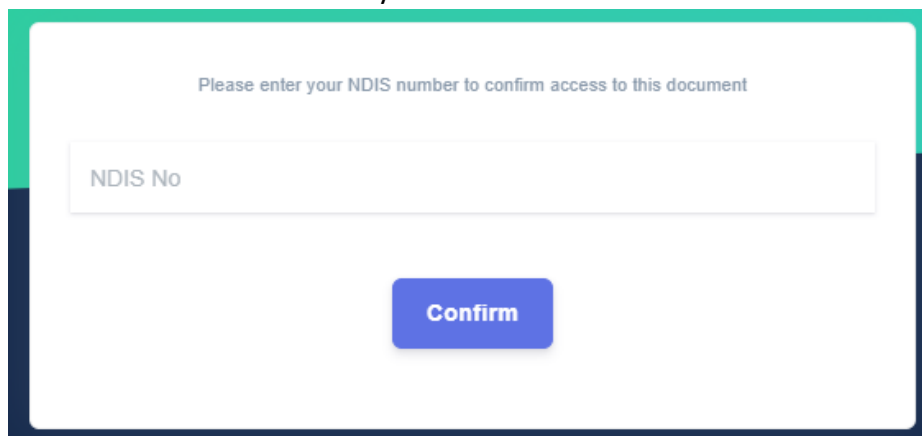
If you have any questions please reach out to us on the contact details below.

Regards,  
Edwin Camporedondo  
[edwin.camporedondo@kalingaaustralia.com.au](mailto:edwin.camporedondo@kalingaaustralia.com.au)  
Kalinga

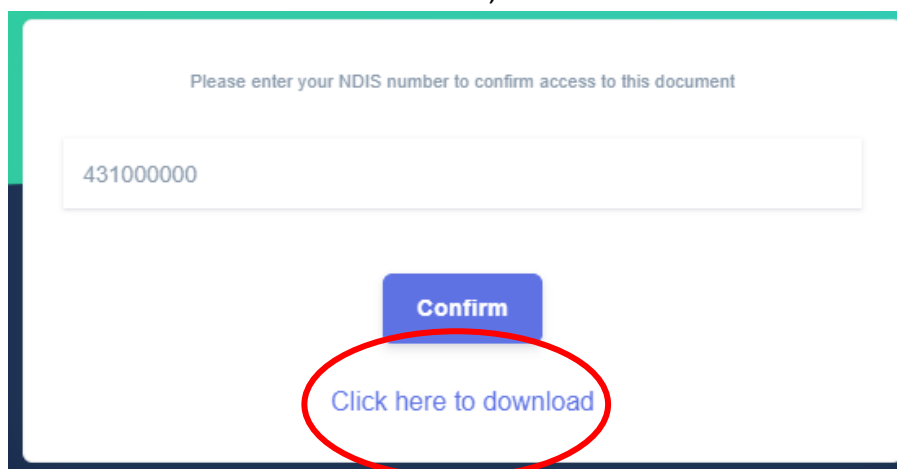


4. Once you have clicked on this view statement, you will need to enter in the NDIS number.

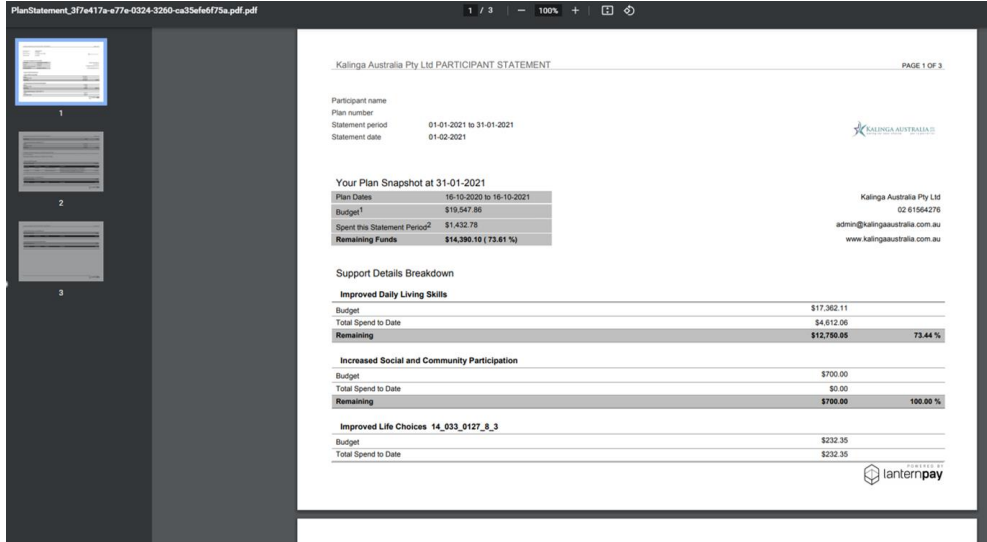
- Please make sure there are **no spaces** in the NDIS number.
- NDIS number should only start with **430** or **431**.



5. Once the NDIS number has been entered, click on **'click here to download'**.



6. The report will automatically download in a new window or tab. From there you can view your transaction report statement and you are able to save, download or print a copy.



PlanStatement\_3f7e417a-e77e-0324-3260-ca35efedf75a.pdf.pdf 1 / 3 100%

Kalinga Australia Pty Ltd PARTICIPANT STATEMENT PAGE 1 OF 3

Participant name  
Plan number  
Statement period 01-01-2021 to 31-01-2021  
Statement date 01-02-2021

**Your Plan Snapshot at 31-01-2021**

Plan Dates	16-10-2020 to 16-10-2021
Budget <sup>1</sup>	\$19,547.86
Spent this Statement Period <sup>2</sup>	\$1,432.78
<b>Remaining Funds</b>	<b>\$14,390.10 ( 73.61 %)</b>

Kalinga Australia Pty Ltd  
02 61564276  
admin@kalingaustralia.com.au  
www.kalingaustralia.com.au

**Support Details Breakdown**

**Improved Daily Living Skills**

Budget	\$17,362.11
Total Spent to Date	\$4,612.06
<b>Remaining</b>	<b>\$12,750.05 73.44 %</b>

**Increased Social and Community Participation**

Budget	\$700.00
Total Spent to Date	\$0.00
<b>Remaining</b>	<b>\$700.00 100.00 %</b>

**Improved Life Choices 14\_033\_0127\_8\_3**

Budget	\$232.35
Total Spent to Date	\$232.35

lanternpay

Kalinga Australia Pty Ltd PARTICIPANT STATEMENT

PAGE 1 OF 3

Participant name  
Plan number  
Statement period 01-01-2021 to 31-01-2021  
Statement date 01-02-2021



**Your Plan Snapshot at 31-01-2021**

Plan Dates	16-10-2020 to 16-10-2021
Budget <sup>1</sup>	\$19,547.86
Spent this Statement Period <sup>2</sup>	\$1,432.78
<b>Remaining Funds</b>	<b>\$14,390.10 ( 73.61 %)</b>

Kalinga Australia Pty Ltd  
02 61564276  
admin@kalingaustralia.com.au  
www.kalingaustralia.com.au

**Support Details Breakdown**

**Improved Daily Living Skills**

Budget	\$17,362.11
Total Spent to Date	\$4,612.06
<b>Remaining</b>	<b>\$12,750.05 73.44 %</b>

**Increased Social and Community Participation**

Budget	\$700.00
Total Spent to Date	\$0.00
<b>Remaining</b>	<b>\$700.00 100.00 %</b>

**Improved Life Choices 14\_033\_0127\_8\_3**

Budget	\$232.35
Total Spent to Date	\$232.35



For any further question or concerns on monthly transaction report statements, please email [admin@kalingaustralia.com.au](mailto:admin@kalingaustralia.com.au) or call 02 6156 4276.