Quarterly funding period planner

One page per funding period. Fill it in on day one, update it when you claim.

Participant	Funding period	Period ends

Budgets this period

Category	Released this period	Spent so far	Claims not yet in	Left to spend
Core supports				
Capacity building				
Capital				
Stated / other				

Safe to spend per week

(Left to spend − claims not yet in) ÷ weeks left in this period =

$

The balance on a screen can be higher than what you really have: supports already delivered but not yet claimed are still in it.

Weekly check-in

Week	Date	Spent this week	Claims lodged?	Still on pace? Y / N
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				

Three things to remember

- Money unused at the end of a funding period rolls into the next period of the same plan. Money unused at the end of the whole plan does not carry over.
- Self-managed: keep receipts, invoices, dates and notes for 5 years. Photograph paper receipts the day you get them.
- If a period is getting tight, talk to the provider early. A support can be claimed against the next period if you both agree and the plan still covers it.

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