# Accessible journey maps for plan managers

## Map 1: Establish plan management – first plan

The text below outlines the provider journey map for how to establish plan management for an NDIS (National Disability Insurance Scheme) participants first plan in our new computer system. The text also includes the steps involved for the NDIA (National Disability Insurance Agency) planner, Agency systems, a plan manager and what a providers business system will do.

The following headings capture the key journey phases, with dot points outlining the key steps involved for NDIS participants, plan managers, providers, Agency systems and provider systems within the journey phase.

### Community connections

* The NDIS participant (applicant) will engage with the the access and planning process of the NDIS.
* The NDIA planner will discuss the fund management options with the participant.
* The NDIA planner will offer or conduct a plan implementation meeting and the approve the first plan in the new computer system with plan-managed supports.
* The NDIS participant will select a plan management provider, they will connect with them to discuss their services. The plan manager will confirm with the participant if the services can be provided and discuss a service agreement. If the NDIS participants as unsure of what provider to use, to identity a potential provider the NDIA planner can guide them to use the provider finder.
* The NDIS participant will advise of the plan management provider and dates with the NDIA planner, to input into our new computer system.
* The NDIA planner will create a role in our new computer system from the nominated start date and set the role end date to a specific date or ongoing.
* The amount of plan and budget information shown is set to or reflects provider type. A notification in the my NDIS provider portal of the new role allocation will be visible to the selected plan manager.
* The plan manager will be able to access the participant information in the my NDIS provider portal and have discussions with the NDIS participant about their plan in the new computer system.

## Map 2: Transfer of an existing plan manager relationship to the new computer system

The text below outlines the provider journey map for how to transfer an existing plan manager relationship to the new computer system. The text also includes the steps involved for the NDIS participant, NDIA planner, Agency systems, what a providers business system will do and the plan manager.

The following headings capture the key journey phases, with dot points outlining the key steps involved for NDIS participants, plan managers, providers, Agency systems and provider systems within the journey phase.

### Creating your plan and using your plan

* The NDIS participant will engage with the plan transition process and the NDIA planner will approve the first plan with plan managed supports.
* Our new computer system will identify a single active plan management service booking from our old computer system, to auto-create a plan manager role in our new computer system.
* The service booking end-date is revised in the providers system to the day prior to the plan approval in our new computer system.
* The role of the plan manager in our new computer system will be allocated to the plan manager that held the service booking. The role start date is set to plan approval date and the end-date set to ongoing.
* The amount of plan and budget information shown is set to or reflect the provider type.
* The plan manager will receive and be able to review a notification in the my NDIS provider portal of the role allocation for the participants plan. The plan manager will then be able to access the participants' information in the my NDIS provider portal. The plan manager will have the option to confirm the service booking end date in the myplace provider portal.
* The NDIA planner will offer the participant a plan implementation meeting for the participant to engage in. The participant will confirm the auto-created role and associated attributes (e.g., end-date) and if required record any changes requested by the participant and update role attributes.
* The participant and plan manager will then discuss the participants plan in the new computer system.

Map 3: **Plan manager – Submit a claim via API (Application Programming Interface)**

The text below outlines the provider journey map for how it will work in our new computer system when a plan manager submits a claim via API. The text also includes the steps involved for the NDIS participant and what the providers business system will do.

The following headings capture the key journey phases, with dot points outlining the key steps involved for plan managers, Agency systems, provider systems and NDIS participants within the journey phase.

### Creating your plan and using your plan

* The plan manager will submit a claim in our new computer system.
* The plan managers claim data in their system is passed to NDIS API and sent to our new computer system.
* The claim is then validated against our systems rules and looks for plan manager relationship in our new computer system, to determine the claim outcome.
* If the claim is valid, then a payment is issued and remittance advice is generated for paid claims. The plan manager can review the remittance advice in the myplace provider portal.
* The claim update will be available in the providers system and where they can review the claim outcome.
* The participants claim history will be updated.

## Map 3: Plan manager – Submit a claim via myplace provider portal

The text below outlines the provider journey map for how it will work when a plan manager submits a claim via myplace provider portal. The text also includes the steps involved for the NDIS participant and what the Agency systems will do.

The following headings capture the key journey phases, with dot points outlining the key steps involved for general providers, Agency systems and NDIS participants within the journey phase.

**Using your plan**

* The plan manager provider will submit a claim for a NDIS participants plan in our new computer system via the myplace provider portal bulk claim function.
* The claim data is sent from the myplace provider portal to our new computer system and then validated against the system's rules.
* The new computer system will look for plan manager relationship for the participants plan.
* If there is a plan manager relationship in our new computer system, the claim outcome is then determined.
* The plan manager can review the outcome in the myplace provider portal and the participants claim history is updated.
* If the claim is valid, then a payment is issued and remittance advice is generated for paid claims.

## Map 5: Payment enquiry related to a plan on the new computer system

The text below outlines the provider journey map for how it works to make a payment enquiry related to a plan on the new computer system. The text also includes the steps involved for all providers the National Contact Centre (NCC) and the NDIS claims and payment officer.

The following headings capture the key journey phases, with dot points outlining the key steps involved for all providers, National Contact Centre and the NDIS claims and payment officer within the journey phase.

### Using your plan

* All providers can call the National Contact Centre for support on how to make a payment enquiry for a plan on the new computer system.
* Provider can submit a payment enquiry from the myplace provider portal.
* The NCC will determine if the providers issues require further investigation.
* If yes, the NDIS claims and payment officer receives a new enquiry to investigate and if payment support is required. If yes, where indicated, claims and payment officer organises payment. If no, the issue is resolved and the enquiry is closed. The provider can review the outcome from a closure email or the myplace provider portal
* If the NCC determined the payment issue did not require further investigation, they will resolve it with the provider and the enquiry will be closed. The provider will consider the outcome and any further steps required.

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