# Checklist – Plan managers

# The checklist below will help plan managers understand what is involved and the steps to start using the new my NDIS provider portal.

## Information

* I have read the [plan manager information pack](https://improvements.ndis.gov.au/providers/working-participants/plan-managers#plan-manager-checklists-and-information-packs).
* I have read the [quick reference guide (QRG) for plan managers](https://improvements.ndis.gov.au/providers/working-participants/plan-managers#what-does-day-1-look-like-for-plan-managers).
* I have read about [changes to budget support categories](https://improvements.ndis.gov.au/providers/claims-and-payments/support-catalogue) in the new NDIS computer system.
* I have read about the [new my NDIS provider portal](https://improvements.ndis.gov.au/my-ndis-provider-portal).
* I have completed the my NDIS provider portal tutorials on the [provider learning environment](https://provider-portal-training.ndis.gov.au/#id=null).
* I have read the [PACE technical documentation for providers](https://improvements.ndis.gov.au/providers/provider-tools-and-resources#tools-and-resources-for-providers).
* I have read the [my NDIS provider portal step-by-step guide](https://www.ndis.gov.au/providers/working-provider/myplace-provider-portal-and-resources#my-ndis-provider-portal-step-by-step-guide).
* I have read about the [upcoming improvements to our new computer system](https://improvements.ndis.gov.au/new-system-improvements).
* I have read the [frequently asked questions on our new computer system](https://improvements.ndis.gov.au/providers/frequently-asked-questions-providers).

## Processes

* I understand [service bookings](https://improvements.ndis.gov.au/participant-endorsed-providers) are not used for participant plans developed in the new NDIS computer system.
* I understand [the process for participant consent](https://improvements.ndis.gov.au/participant-consent-and-viewing-plans) to share information with me in the my NDIS provider portal.
* I understand [what different types of providers can see in](https://improvements.ndis.gov.au/participant-consent-and-viewing-plans) the my NDIS provider portal.
* I understand how to request to be [recorded as a participant’s plan manager via the my NDIS provider portal](https://improvements.ndis.gov.au/plan-managers).
* I understand how a [participant changes their plan manager](https://improvements.ndis.gov.au/plan-managers).
* I understand how support items link to [new support categories](https://improvements.ndis.gov.au/support-catalogue).

If you need further support, please email, [provider.support@ndis.gov.au](mailto:provider.support@ndis.gov.au) or call us on 1800 800 110.