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.
- I have read the quick reference guide (QRG) for plan managers.
- I have read about changes to budget support categories in the new NDIS computer system.
- I have read about the new my NDIS provider portal.
- I have completed the my NDIS provider portal tutorials on the provider learning environment.
- I have read the PACE technical documentation for providers.
- I have read the my NDIS provider portal step-by-step guide.
- I have read about the upcoming improvements to our new computer system.
- I have read the frequently asked questions on our new computer system.

Processes

- I understand service bookings are not used for participant plans developed in the new NDIS computer system.
- I understand the process for participant consent to share information with me in the my NDIS provider portal.
- I understand what different types of providers can see in 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.

- I understand how a [participant changes their plan manager](#).
- I understand how support items link to [new support categories](#).

If you need further support, please email, provider.support@ndis.gov.au or call us on 1800 800 110.