Plan manager information pack

March 2024

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Introduction

The NDIA has designed and built a new NDIS computer system to improve how we work together with participants and providers. Our new computer system will be supported by new my NDIS provider and participant portals.

Through the design and build of the new computer system and portals, we have made it a priority to minimise impacts to providers. If we didn't need to change something, we haven't. Our improvements are designed to:

- Provide more efficient systems and processes.

- Reduce administration for providers while creating opportunities for business growth.

- Give providers more time for meaningful connections with participants.

We tested our new computer system and improved ways of working in Tasmania between November 2022 and March 2023.

From the Tasmania test, we learnt that providers wanted to see more resources to help them change the way they do their work or adjust their systems and processes. Providers told us these should be separate resources for the kind of work they do, for example plan managers, support coordinators and general providers.

This guide contains useful information and links to more resources to help **plan managers** learn about the improvements we've made. It also provides information on what they need to do to prepare for the introduction of our new computer system and ways of working.

We started gradually introducing our new computer system and processes across Australia on 30 October 2023.

Providers can find out more by visiting the dedicated website at improvements.ndis.gov.au

What's staying the same?

Our new computer system and improved ways of working don't change the NDIS rules, the rules for plan managers, or the work plan managers and participants do together. As happens now, plan manager funding is included in NDIS plans.

Participants will continue to choose the plan manager they want to work with. When choosing a plan manager, participants will need to give their consent for their chosen plan manager to view information about their plan. This is required for a plan manager to perform their role.

Plan managers will help participants make the most of their plan by:

- Managing and monitoring NDIS budgets as per their service agreement with the participant.
- Managing NDIS claims according to the NDIA pricing arrangements and price limits document.
- Ensuring funds are spent in line with the participant's plan and budgets.
- Maintaining records for participants and providing statements.
- Using the myplace provider portal to pay provider claims.

What's changed?

Plan managers will need to:

- Use the new my NDIS provider portal to see participant plans and plan managed budgets.
- Request the participants they work with talk to their NDIS contact and ask for their plan manager to be recorded on their plan. Plan managers then become one of the participant's 'my providers' and this relationship is established in our new computer system.
- Know NDIS plans in our new computer system will have 4 support types and 6 new stated support categories.
- Be aware that NDIS plans in our new computer system will not have service bookings.
- Adjust their business practices to submit all single claims via the bulk upload process.
- Be aware the my NDIS provider portal has been updated to include new notifications.

Plan managers will be notified when:

- They have a new relationship with a participant.
- The start date or end date of an existing relationship changes.
- Their participant has a new plan approved.

- Their participant's plan reassessment date is changed.
- Their participant has an existing plan-managed support category budget changed (increased, decreased or removed).
- Their participant has a new plan-managed support category added.

Tools and resources for plan managers

Resources to help plan managers get ready for our new computer system and ways of working can be found on our website. They include:

- A provider information pack.
- A checklist to help get ready.
- Quick reference guides for day one.
- Portal step by step guide.
- Technical information that shows the key concepts and features our new computer system gives providers.
- Information about new support categories.
- A provider learning tool, to assist providers with new processes.
- The plan manager page on our website.

Choosing or changing plan managers

We have introduced a new self-service feature to make it easier for plan managers to work with participants.

Plan managers can request via the my NDIS provider portal:

- To support a participant.
- To end their relationship with a participant.
- An extension to an existing relationship.

Participants with plan management funding who want to keep working with their existing provider, or have already identified their preferred provider, can have them recorded as the plan manager for their plan.

Participants who need to choose a plan manager for the first time, or want to change the plan manager they have, will be encouraged to explore the open market, and use the tools and resources available to identify and approach their preferred provider.

Once a participant has selected their plan manager, the plan manager can request via the my NDIS provider portal to support the participant. In response to feedback from plan managers, we have improved the formatting consistency and accessibility of the 'Relationship request tab' in the my NDIS provider portal. The request will then be sent to the participant's my NDIS contact.

The my NDIS contact will discuss the request with the participant or their authorised representative and ask if they would like to accept, adjust or reject the request.

If the participant does not accept or reject the request within 28 days, the request will be cancelled.

Plan managers will be able to see the status of their request – submitted, accepted as proposed, accepted with adjustments, rejected, or cancelled where the participant has not been able to be contacted – in the my NDIS provider portal.

Once the request is accepted by the participant, the participant's details will be displayed in the my NDIS provider portal and the plan manager becomes a 'my provider' for the participant plan.

Participants can record, change or remove a plan manager at any time by speaking with their my NDIS contact, by calling the National Contact Centre on 1800 800 110, emailing enquiries@ndis.gov.au or via the web chat on the NDIS website.

New support types and support categories

Plan managers should continue to use the support item descriptions or numbers they already use. These can be found in the support catalogue.

Our new computer system and improved processes do not change the NDIS pricing arrangements and price limits.

To make sure our language is consistent across NDIS plans and portals, the name of the support catalogue item in the plan will be the same name in the participant and provider portals.

Support types

We are moving from 3 to 4 support types, adding **recurring** as a new support type.

Support types now include:

- Core
- Capacity building
- Capital
- Recurring.

Support categories

We are moving from 15 to 21 support categories.

We have split some of the existing categories to make the new categories easier to understand. Plan managers will notice this detail displayed at the support category level in participant plans.

The 6 new support categories are stated supports. They are:

Support category	Support type
Home and Living	Core
Behaviour Support	Capacity building
Assistive Technology Repairs and Rental	Capital
Specialist Disability Accommodation (SDA)	Capital
Transport Recurring	Recurring
YPIRAC – Cross Billing	Core

All participants with Specialist Disability Accommodation and Behaviour Supports will need to have their my providers recorded at a support category level in their NDIS plan.

Specialist disability accommodation and behaviour supports must be delivered by providers who are registered with the NDIS Quality and Safeguards Commission. We have included Transport Recurring as a new support category for participants who receive transport funding. Participants who are not eligible for transport funding will have a zero-dollar amount against this support category in their plan.

For some participants, the day they receive their transport funding may change. This is because their recurring transport payments will be established on the day of the week the participant's plan is approved.

The new Young People in Residential Aged Care (YPIRAC) – Cross Billing support category has been added so that funding can be allocated in plans for payments for residential aged care subsidies and supplement. Providers are not able to claim against this category.

Support items

We will continue to have over 850+ support items and these will not change.

PACE support categories are details in the NDIS Support Catalogue 2023-24.

Plan managers can learn more about support types and categories on our website.

Claims and payments

We have built a new provider portal to work with our new computer system. It's called the my NDIS provider portal.

We will continue to have one claims portal while participants transition to our new computer system. Plan managers should continue to use the myplace provider portal to manage all their financial transactions with the NDIA, including:

- Making payment claims.
- Raising payment enquiry tickets.

There are no changes to how plan managers make claims in the myplace provider portal, support item descriptions, or the codes used to make claims.

If a claim is rejected, plan managers will see advice in the portal that describes the reason the claim has not been processed. Most claim payment errors can be corrected by the person making the claim. For example, administrative errors like wrong dates, a duplicate claim, missing banking or ABN details, or the claim includes a unit price that is more than the maximum price. Plan managers can refer to the system and error messages guide for more information.

Plan managers can cancel claims in the myplace provider portal for participants who have an NDIS plan in our new computer system. Claims can be cancelled when they are "pending" or "paid." Plan managers should follow the myplace provider portal step-by-step guide to cancel their claim.

Plan managers who submit claims for services with a date before the start of their my provider relationship with the participant, will see these claims in the portal as "open," without an error or explanation message.

Plan managers can now only submit claims for supports delivered within their current plan-management period.

Plan managers need to make sure they submit any claims before their plan management period on a participant's plan ends.

Plan managers can call the National Contact Centre to check the start date of their my provider relationship with the participant. If the start date isn't correct, plan managers will need to ask the participant to call the National Contact Centre to adjust the start date.

Bulk payment claims

Once a participant has a NDIS plan in our new computer system, plan managers will not be able to use the single claim function in the myplace portal.

Claims will need to be made using the Bulk Payment Request template (CSV 1KB)

Plan managers are encouraged to consider adjusting their business practices to submit all single claims via the bulk upload process. If providers use the bulk payment request template, they don't need to understand if a participant has an NDIS plan in our new computer system because all claims should be made through the myplace provider portal.

Using the bulk uploads process will also reduce the likelihood of receiving single claim error messages, duplicating processes, and experiencing payment delays. Providers who receive error messages can refer to the Bulk Payment Request self-help guide (DOCX 2.2MB).

Removing service bookings

As participants move to our new computer system, the requirement for service bookings will be removed. Instead, participants can tell us who their my providers are for their plan.

When we develop new plans for existing participants in our new computer system, their new plan will be based on their previous one. If the previous plan had a plan manager, the participant will be asked if they would like that provider to remain as their plan manager. If the participant agrees, the plan manager will be recorded as the participant's my provider for plan management supports.

Plan managers will also be able to identify a participant has transitioned to our new computer system by one of the following ways:

- Error messages when submitting a single payment claim request against the current plan period. The error message will indicate the participant has transitioned to the new system.
- Existing service bookings will automatically be end dated for the previous plan. Plan managers will be able to see this in the myplace provider portal report function.
- Plan managers won't be able to create a service booking for the participant in the myplace provider portal.

Viewing participant plans

Once appointed by a participant, plan managers will be:

- Able to view participant plans and budgets that are plan managed.
- Automatically be approved as 'my providers' for the budgets they manage.

Plan managers can use the my NDIS provider portal to see:

- Participant plans and budgets they manage.
- Details like plan duration, participant's preferred name, their NDIS number, date of birth, gender and if an interpreter is required.
- The participant's active and old goals and budgets, funded supports, nominee details and relationship type.

- The plan-managed budget details for the support categories and support types for which the plan manager is responsible.
- If there are any self-managed or NDIA-managed supports in the participant's plan, and if those categories have any funds available.

Creating reports in my NDIS provider portal

Providers can now create reports in the my NDIS provider portal for participants with plans in our new computer system.

There are four types of reports that providers can download from the my NDIS provider portal:

- PACE claims history report
- My participants report
- Notifications report
- Participants budget report.

Providers can access and download all report types, but the amount of information shown in each report depends on the provider's role and the consent their participant has given for the provider to view their information. Visit the participant consent and viewing plans page for more information.

For example, plan managers don't have access to view all of a participant's budget information. This means if they download the participants budget report it will not include all budget information.

Reports will expire 24 hours after they've been generated and will be removed from the 'Available reports' list.

Providers will need to continue to use the myplace provider portal to create reports for participants whose plans have not yet moved to the new computer system.

Learn more

Plan managers can visit our website to learn more and find tools and resources to help them prepare for our new computer system and portal.

Plan managers can call our National Contact Centre on 1800 800 110 or email provider.support@ndis.gov.au for assistance.