What does day 1 look like: Plan managers

This Quick Reference Guide (QRG) has been created to support **plan managers** transition to our new computer system.

The new computer system has been tested in Tasmania since November 2022. We started gradually introducing our new computer system and processes across Australia on 30 October 2023.

This QRG will show you what day 1 looks like as a plan manager supporting a participant with a plan in our new computer system. It will help you understand what is changing for you as a plan manager.

What do I need to check before reading this QRG?

Before reading this QRG, you will need to check that you have completed the following:

- I have read the published information about the new computer system.
- I have read about the new my NDIS provider portal.
- I have completed the provider portal learning tasks.
- I have completed the plan manager checklist.

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- I can access the systems I need, such as the [new my NDIS provider portal](#) and [existing myplace provider portal](#).
- I have read the QRGs for registered providers, support coordinators and recovery coaches on the [NDIS website](#).

What can I expect on day 1?

We are working hard to improve outcomes for our participants by delivering a better NDIS. With the introduction of a new computer system, a change of this size will take time and not all changes will happen straight away.

Throughout the design and build of the new computer system, we have made it a priority to minimise impacts to providers. We have focused on making improvements that reduce administration for providers, create opportunities for business growth and provide time for meaningful connections with participants.

We have tested the new system and processes in Tasmanian since November 2022.We are now implementing these changes nationally. Processes and systems will be refined to make sure we continue to meet the expectations of participants, providers, NDIS partners, NDIA staff and the wider disability community.

Registered providers will still be able to access the existing myplace provider portal via the [myplace provider portal link](#) on the NDIS website, to view the details of participants that have provided consent.

A participant's plan will transition to our new computer system when we develop a new plan for them. This could occur when their plan reaches its reassessment date, or when they ask for changes to their plan.

Day 1 for a plan manager will be the first day that a participant establishes a relationship with them to deliver plan management supports to them in the new computer system.

Plan managers will use the new my NDIS provider portal to:

- Request to support a participant, end a relationship with a participant or extend an existing relationship with a participant.
- View the relevant details of a participant who has transitioned to the new computer system and has established a relationship with them. These details include information such as goals and plan managed budgets.

Plan managers will use the existing myplace provider portal to:

- Submit all claims for payment, as they currently do.
- View the relevant information for a participant who has not yet transitioned to the new computer system.

Plan managers will only be able to use the new my NDIS provider portal when participants they support have plans set up in the new computer system and when the participant has provided consent.

What is staying the same?

Plan managers will continue to help participants to manage the funding in their NDIS plan. This includes:

- Helping participants to understand the types of supports they can purchase.
- Helping participants to monitor their budget.
- Paying invoices for NDIS funded supports, on the participant's behalf.

What are the changes for plan managers?

Registered plan managers will be able to use their existing Provider Digital Access (PRODA) account to access the new my NDIS provider portal. You will also be able to access the new my NDIS provider portal via the current link on the NDIS website and will be redirected to the relevant portal.

The new computer system and my NDIS provider portal will give plan managers better visibility of participant and plan information.

The choice and control budget in our new computer system will be plan-managed only. This was previously Agency-managed.

Plan managers will have visibility of much funding is allocated to the plan management fees for the choice and control budget, when viewing their participant's plan information in the my NDIS provider portal.

A plan manager will be able to see when:

- A participant has a new plan built in the new computer system.
- A participant has asked to make changes to their plan.

We have introduced a new self-service feature to make it easier for plan managers to work with participants. Plan managers can request to support a participant via the my NDIS provider portal.

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. We continue to [make improvements](#) to the my NDIS provider portal to support providers.

To submit a request through the my NDIS provider portal, plan managers need to submit the participant's last name, date of birth, NDIS number, and nominate a start and end date (or leave blank if the participant would like for the relationship to be ongoing).

The new computer system will then check if the:

- Participant details entered are correct.
- Participant has plan management support available in their plan.
- Participant already has a plan manager.
- Plan manager is a registered provider and has an active registration.
- Plan manager is already supporting the participant.

If all details are correct, the request will be sent internally 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.

Once the plan manager's request is accepted, they will be able to see the participant's goals and the plan details that are plan managed.

Plan managers will continue to upload claims for payment via the existing myplace provider portal.

We know system changes can have a big impact on providers and their businesses. The major changes are outlined below, to help you understand what these changes mean for you.

What do I need to do on day 1?

Plan managers will see no change in how they use the existing myplace provider portal. All information relating to existing participants who are not due for a plan reassessment will continue to be in the existing myplace provider portal.

When completing work in the new my NDIS provider portal, relating to a participant with a plan in our new computer system, there are common scenarios a plan manager will encounter from day 1. These include:

1. Work completed in the **new** my NDIS provider portal for participants who **have** transitioned to the new computer system.
2. Work completed in the **existing** myplace provider portal for participants who **have** transitioned to the new computer system.
3. Work that will **continue** in the existing myplace provider portal for participants who **have not** transitioned to the new computer system.

The following table lists typical scenarios that will be encountered by plan managers from day 1. This list provides guidance on some of the changes and how to navigate them.

This QRG should be read in line with the plan manager information pack, Frequently Asked Questions and portal step-by-step guides, available on the NDIS website.

#	Common scenarios	Description and next steps	System to be used
1	I am nominated to be a plan manager for a participant who **has** transitioned to the new computer system.	When you have been recorded as a plan manager by participants who **have** transitioned to the new computer system, you will be able to view the participant's plan information and plan-managed budgets in the new my NDIS provider portal. The existing myplace provider portal will continue to be used to process claims for payment.	New my NDIS provider portal (claims for payment will continue in the myplace provider portal)
2	I want to create a claim for payment for a participant who **has** transitioned to the new computer system.	You will need to continue using the existing myplace provider portal to create a claim for payment, including for participants who **have** transitioned to the new computer system. The myplace provider portal enhancements mean that	Existing myplace provider portal

#	Common scenarios	Description and next steps	System to be used
		separate bulk uploads will no longer be required.	
3	I am nominated to be a plan manager for a participant who **has not** transitioned to the new computer system.	There will be no changes for participants who **have not** transitioned to the new computer system. As usual, when you have been nominated to be a plan manager, you will be notified by the participant's my NDIS contact. Plan managers will continue to use the existing myplace provider portal to view the plan and budget information and continue to claim for payments.	Existing myplace provider portal
4	I want to create a service booking for a participant who **has not** transitioned to the new computer system.	There will be no changes for participants who **have not** transitioned to the new computer system (service bookings are not required for participants who **have** transitioned to the new computer system). Plan managers will continue to use the existing myplace provider portal to create service bookings.	Existing myplace provider portal

Which system should I use?

Plan managers will continue to use the existing myplace provider portal and the new my NDIS provider portal.

System	What will plan managers do and be able to see in this system?
New my NDIS provider portal	• Support participants who **have** transitioned to the new computer system. • View the budget and plan for participants who have transitioned (claims for payment will continue in the myplace provider portal).
Existing myplace provider portal	• Support participants who **have not** transitioned to the new computer system. • Continue to submit claims and payments for all participants.

More information and support

We are committed to minimising the business impact of system changes on providers.

For more information and support, please:

- Call the National Contact Centre on 1800 800 110.
- Read the Provider Information Pack.
- Fill out the NDIS contact and feedback form.
- Email provider.support@ndis.gov.au.