

# Support coordinator and psychosocial recovery coach information pack

Moving to our new computer system

June 2024

## Contents

Contents.....	2
Introduction .....	3
What's staying the same? .....	4
What's changed?.....	4
Tools and resources for support coordinators .....	5
Request for service: choosing a support coordinator .....	5
Accepting a request for service .....	6
Introducing participant check-ins .....	7
New reporting templates .....	7
Viewing participant plans.....	8
Claims and payments .....	10
Unregistered support coordinators and psychosocial recovery coaches.....	11
Creating reports in my NDIS provider portal .....	12
Learn more.....	13

## 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.

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

This guide contains useful information and links to more resources to help registered and unregistered [support coordinators](#) 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.

Providers can find out more by visiting the dedicated website at [improvements.ndis.gov.au](https://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 support coordination, or the work support coordinators and participants do together. As is the case now, support coordination funding is included in NDIS plans as a time limited support that may reduce over time as participants become more comfortable and confident using their NDIS plan.

Participants will continue to choose the support coordinator they want to work with and will need to give their consent for their provider to see their plan.

Support coordinators will help participants make the most of their plan by:

- Helping build a participant's capacity and capability to understand their plan, navigate the NDIS and make their own decisions.
- Brokering supports and services in line with participant wishes and their plan budget.
- Monitoring plan budgets, value for money and the effectiveness of the supports.
- Providing regular progress reports, letting the NDIA know if the participant's plan is meeting their needs or it needs to be changed.

## What's changed?

Support coordinators will need to:

- Use the new my NDIS provider portal to accept or decline a request for service.
- Use the new templates for their implementation and progress reports.
- Submit implementation and progress reports in the new my NDIS provider portal.
- Support coordinators who are not registered providers with the NDIS Commission will need to create an on-system account with the NDIA to make sure they can receive requests for service.
- Use the new my NDIS provider portal to view participant plans and plan-managed budgets.
- Understand the changes to [support categories](#) in the new computer system.
- Understand that all 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.
- Submit and view all new payment enquiries in the my NDIS provider portal.

- Be aware the my NDIS provider portal has been updated to include new notifications.

Support coordinators will be notified when:

- They have a new request for service.
- They have a new relationship with a participant.
- The start and end date of an existing relationship changes.
- The participants plan reassessment date has changed.
- The participant has an existing self-managed support category budget changed (increased, decreased or removed).
- The participant has an existing self-managed support category added.  
The participant has a new plan approved and the support coordinator holds consent.

## Tools and resources for support coordinators

Resources to help support coordinators get ready for our new computer system and ways of working can be found on our [website](#). They include:

- Information pack for support coordinators and psychosocial recovery coaches.
- 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 environment](#), to assist providers with new processes.
- The [support coordinator page](#) on our website.

## Request for service: choosing a support coordinator

Participants will continue to choose their preferred support coordination provider.

If a participant has support coordination services in their plan, they need to tell us who their preferred provider is so we can send a request for service in the new my NDIS provider portal. We call this process a request for service.

Providers will receive a notification in the portal when they have a new request for service to action.

Providers can share helpful information with participants such as their Legal and

trading name, ABN and NDIS provider registration number to make sure the request for service is sent to the correct provider organisation. This will minimise delays in receiving the request for service.

The request for service process will occur for all new and existing participants with support coordination funding in their plan if the participant:

- Is using support coordination services for the first time.
- Wants to change the provider they have.
- Wants to keep working with the same provider.

We'll send a request for service to the provider the participant has chosen.

This means providers who expect to continue working with a participant on their new plan when it changes over to our new computer system will still receive a request for service.

Participants can tell us who their preferred support coordination provider is at any time. For example, in their plan approval meeting, their plan implementation meeting, or by calling the National Contact Centre.

## Accepting a request for service

Providers will get a notification from us when they receive a request for service. Providers will have 4 days to accept or reject the request in the new my NDIS provider portal. After 4 days, the request will be shared with another provider.

After a request for service has been submitted to the my NDIS provider portal, a status will show for each provider in the list. These are:

- **Referred.** The provider is within their 4 days to consider the request for service.
- **Queued.** The provider will receive the request for service if the provider before them does not respond within 4 days, or if that provider rejected the request for service.
- **Cancelled.** The provider has been removed from the list, so they will not receive a request for service.
- **Accepted.** The provider has accepted the request for service and will provide the service to the participant.
- **Rejected.** The provider has rejected the request for service.

When a provider accepts the request for service, their relationship with the participant will be active in our new computer system. Accepting the request means the provider:

- Agrees to meet the NDIA reporting requirements for their service.

- Will be recorded on the participant's plan as 'my providers' (formerly referred to as participant-endorsed providers in the Tasmania test).
- Will be able to submit payment claims in the my NDIS provider portal.

Support coordinators should regularly log in to their my NDIS provider portal to make sure they are aware of new requests for service.

## Introducing participant check-ins

During a participant's plan, we'll check-in to see how they are going and how their plan is working for them.

We generally check-in with participants:

- Every 12 months, if their plan is longer than one year.
- About 4 months before their plan reaches its reassessment date.
- If we see they are using their funding at a faster or slower rate than usual.
- If they would like some additional help to use the supports in their plan.

During the check in, we talk about:

- How the participant is going with their goals.
- If their plan and funding is working well for them.
- If their situation has changed.

After a check-in, we may need to vary or create and approve a new plan.

Providers can find more information about how we support participants with a plan reassessment on our [website](#).

## New reporting templates

When a support coordinator accepts a request for service, they agree to meet the NDIA reporting requirements.

We developed the reporting templates to help standardise provider reports and capture consistent information to help NDIA planners and NDIS partners prepare for check-ins and plan reassessments with participants.

The reporting templates have been designed through feedback from users and we expect them to take about the same amount of time to complete as current reporting.

The new reporting templates will make it easier for support coordinators to:

- Share relevant and consistent information with the NDIA.
- Meet the reporting requirements outlined in the request for service.

The templates ask providers for information about:

- The participant's support needs and situation.
- The supports the participant is receiving.
- The participant's progress in implementing their plan to pursue their goals.

Providers should complete the reporting template through discussions with the participant and the people who support them, making sure participants are aware of the detail included.

Support coordinators will be asked to submit reports across the life of a participant's plan, generally at a set period. The timing of reports may change, depending on the participant's circumstances and when their next plan reassessment is due.

Providers will receive a notification in the portal when they have a report due.

Support coordinators should regularly log in to their my NDIS provider portal to track due dates for the reports. Reports can be submitted as attachments in the my NDIS provider portal. A tutorial on how to submit an implementation or progress report in the my NDIS provider portal can be found on the provider learning [environment](#).

Find the implementation and progress report templates on our [website](#).

## Viewing participant plans

The rules and the way we manage consent and share participant information does not change with the introduction of our new computer system.

Participants who are 18 years and older can provide consent for the NDIA to collect and share information about them with another person or organisation, like a provider, even if:

- We have sent a request for service to a support coordination provider on behalf of a participant; or
- A support coordination provider is recorded as a my provider on a plan.

We will ask the participant to confirm their consent for their support coordinator to see some of their plan and budget information.

When a support coordinator accepts a request for service, a my provider relationship will be created in the new computer system. Support coordinators can use the my NDIS provider portal to see:

- Details like plan date and duration
- the participant's preferred name and NDIS number



- date of birth
- gender,
- contact information including nominee details,
- relationship type
- and if an interpreter is required.

Where consent has been provided support coordinators will also see:

- The participant's "about me" statement
- active and historical goals, budget and plan information
- funded supports  
informal, community and mainstream supports.

## **New support types and support categories.**

Support coordinators and recovery coaches should continue to use the current support item descriptions or numbers listed in 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 items**

Our new computer system does not change the way we structure support items, including item numbers.

### **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
Specialist Disability Young People Living in Residential Aged Care (YPIRAC) – Cross Billing	Core

## Support category budgets

In our new computer system, funding in NDIS plans will be built at the support category level. There will be no stated support items built into plans.

Budgets will be stated or flexible at the support category level.

Budgets will be listed as a whole dollar figure rather than as line-by-line costs.

Where budgets are listed as flexible, there is flexibility within and across the flexible support categories, matched to how the plan is managed.

Where budgets are listed as stated, there is only flexibility within that support category.

More information including a summary of support category changes and a product catalogue settings document can be found on the [support catalogue](#) page on our website.

## Claims and payments

Support coordinators should use the myplace provider portal to make payment claims.

When a support coordinator accepts a request for service, they become “my providers” (formerly referred to as participant-endorsed providers in the Tasmania test) for the participant’s plan. My provider claims are generally paid within 2 to 3 days of the claim being lodged.

Support coordinators and recovery coaches can claim for supports delivered, once they have accepted the request for service, up to 28 days prior to their role start date, which is recorded in our new computer system.

Support coordinators and recovery coaches who submit claims outside the 28 days may see an error message in the myplace provider portal.

This error message indicates they are not the recorded support coordinator or recovery coach for that period.

From 6 May support coordinators and recovery coaches who receive this message are encouraged to submit a payment enquiry in the my NDIS provider portal.

All payment enquiries submitted in the myplace provider portal prior to 6 May 2024, will remain in and can be viewed in the myplace provider portal.

It's important to remember the payment error message will only apply to claims submitted before a request for service is accepted. Once accepted, providers can submit claims in the usual way.

## Unregistered support coordinators and psychosocial recovery coaches

Unregistered support coordinators will also need to access the my NDIS provider portal to accept and decline requests for service, view plan and budget information and submit reports for participants.

To do this, unregistered support coordinators need to create a PRODA account and contact the NDIA to have a record created and a linking code sent.

Unregistered support coordinators and psychosocial recovery coaches can refer to the unregistered support coordinator checklist for more information on accessing the new my NDIS provider portal.

### Working between computer systems

	Participant is still in current computer system	Participant has moved to new computer system
<b>Participants can view 'my providers'</b>	Not available	my NDIS participant portal
<b>Service bookings</b>	Yes	Not available

<b>View participant record - subject to participant consent</b>	myplace provider portal	my NDIS provider portal
<b>Process claims</b>	myplace provider portal	myplace provider portal
<b>Cancel claims - pending or paid</b>	myplace provider portal	myplace provider portal
<b>Claims processing</b>	Single and bulk upload	Bulk upload only

## Creating reports in my NDIS provider portal

Providers can now create reports in the my NDIS provider portal for participants who have 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:

- **My providers** don't have access to view a participant's budget information. This means if they download the participant's budget report it will be blank.
- **Plan managers** don't have access to view all of a participant's budget information. This means if they download the participant's budget report it will not include all budget information.
- **Support coordinators and recovery coaches** need consent from a participant to view parts of their plan information. This means if they download a report that includes information they don't have access to, it will be blank.

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

Support coordinators can visit our [website](#) to learn more and find tools and resources to help them prepare for our new computer system and portal.

Support coordinators can call our National Contact Centre on 1800 800 110 or email [provider.support@ndis.gov.au](mailto:provider.support@ndis.gov.au) for assistance.