

What does Day 1 look like: NDIS Plan Managers

This Quick Reference Guide (QRG) has been created to support NDIS Plan Managers during the Tasmania Test. The QRG aims to build your understanding of what Day 1 looks like as we introduce a new customer relationship management system (PACE). PACE will align improvements to the amended NDIS Act and Rules.

What do I need to check before reading this QRG?

Before reading this QRG, you will need to check that you have completed some preparation activities:

- I can access to the systems I need, such as, the new and existing provider portals.
- I have read the Provider Information Guide, including the Frequently Asked Questions and Step by Step Guides, on the NDIS website.
- I have attended an information session or reviewed the materials 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. As with the introduction of any new system, a change of this size takes time and not all changes will happen straight away. Processes and systems will be refined over time to ensure that we continue to meet the expectations of our participants, people with disability and our partners, providers, and staff.

The transition of participants and their plan into PACE will occur in a two-stage approach in Tasmania:

- From 14 November, new Tasmanian participants and applicants eligible for the NDIS will be managed in PACE, and
- From 28 November, existing Tasmanian participants will commence transitioning to PACE in line with their plan reassessment date.

From Day 1, some Plan Managers will use the new provider portal. For example, you will:

- Use the new provider portal to view the relevant details of a participant who has transitioned to PACE, including parts of the participant's plan, such as goals and plan managed budgets.
- Continue to use the existing provider portal to submit all claims for payments, as you currently do.
- Use the existing provider portal to view the relevant information of a participant who will gradually transition to PACE.

Day 1 for Plan Managers will be the first day that a participant they deliver plan management services to has a new plan in PACE.

NDIS Plan Managers will only be able to use the features of the new my NDIS portal when new Tasmanian participants join the NDIS, or a participant has their plan built or transferred to PACE as part of the existing plan reassessment process. This may mean that some Plan Managers will only start using the new myNDIS portal features from late November 2022.

What is staying the same?

Plan managers will continue to help participants to manage funding in their NDIS plan. This includes helping participants to understand the types of supports they can purchase, help them to monitor their budget, and pay invoices for NDIS funded supports on their behalf.

What are the changes for Plan Managers?

The changes implemented with the introduction of the new PACE system will benefit Plan Managers with improved visibility of information relating to a participant and their plan, and simplified claims and payments processes through the new provider portal. Creating a claim to receive payment for services and supports provided for a participant will continue through the existing myplace provider portal.

We know system changes can have a considerable impact on providers and their businesses. The major changes as common scenarios are outlined below to help you understand what this means for you.

What do I need to do on Day 1?

During the Tasmanian Test, Plan Managers who support participants residing outside of Tasmania will see no change in how they use the existing myplace provider portal. All work items relating to non-Tasmanian residents will be progressed and finalised in the existing provider portal.

When completing work in the provider portal, relating to a NDIS participant who resides in Tasmania, there are common scenarios a Plan Manager will encounter from Day 1:

1. Work completed in the **new** provider portal for participants who **have** transitioned to PACE.
2. Work completed in the **existing** portal for participants who **have not** transitioned to PACE.
3. Work that will **continue** in the existing provider portal.

The following table lists typical scenarios that will be encountered by Plan Managers from Day 1. This is not an exhaustive list but provides guidance to some of the changes and how to navigate them.

This QRG should be read in conjunction with the Provider Information Guide, Frequently Asked Questions and Step by Step Guides on the NDIS website.

#	Common scenarios	Description and Next steps	System
1	I am nominated to be a Plan Manager for a participant who resides in Tasmania and has not transitioned to PACE.	<p>There will be no changes for participants who have not transitioned to PACE. When you have been nominated to be a Plan Manager, you will be notified by the participant's NDIA Planner or their Local Area Coordinator, as you currently do.</p> <p>Plan Managers will continue to use the existing provider portal to view the information, budget, and plan, and continue to claim for payments for participants who have not transitioned to PACE.</p>	Existing myplace portal
2	I am nominated to be a Plan Manager for a participant who has transitioned to PACE.	<p>Providers will know that they have a participant who has transitioned to PACE once the participant has endorsed the provider. Once a Plan Manager has been endorsed, the participant details will appear in the new provider portal.</p> <p>Transition of participants and their plan into PACE will occur in a two-stage approach:</p> <ul style="list-style-type: none"> From 14 November, new participants, who reside in Tasmania, will begin on PACE when they join the Scheme. From 28 November, existing participants, who reside in Tasmania, will gradually transition to PACE in line with their plan reassessment date. <p>When you have been nominated to be a Plan Manager for a participant who has transitioned to PACE, you will be able to view a participant's plan information and plan managed budgets, in the new myNDIS provider portal.</p> <p>During the Tasmanian Test, the existing myplace provider portal will continue to be used to process a claim for payment.</p>	New my NDIS portal (except for claims for payment which will continue in the existing myplace portal)

#	Common scenarios	Description and Next steps	System
3	Create a claim for payment for a participant who resides in Tasmania.	Plan Managers will continue to use the existing provider portal to create a claim for payment during the Tasmanian Test, including for participants who have transitioned to PACE. The provider portal enhancements mean that separate bulk uploads will no longer be required.	Existing myplace portal
4	Create a service booking for a participant who resides outside of Tasmania.	During the Tasmanian Test, there will be no changes for participants who reside outside of Tasmania. All work will be completed in the existing provider portal for participants who have not transitioned to PACE.	Existing myplace portal

Which system should I use

Plan Managers should continue to use the existing provider portal along with the new provider portal.

System	What will Plan Managers do and see in this system?
New my NDIS provider portal	<ul style="list-style-type: none"> Support Tasmanian participants who have transitioned to PACE. View the budget and plan for participants who have transitioned.
Existing myplace provider portal	<ul style="list-style-type: none"> Support Tasmanian participants who have not transitioned to PACE. Support participants from all other mainland States and Territories. Continue to submit claims and payments for all Tasmanian participants.

Where can I get support and more information?

We are committed to minimising the business impact of system changes on providers. Not disrupting claiming or payments is a priority for the Agency.

We will work with you leading up to, during and after the Tasmanian test to get this change right before we implement these changes nationally. We will do this through an extended user acceptance testing period where we will seek your support and feedback to make sure PACE works as intended.

Where you can go for support:

- By calling the National Contact Centre on 1800 800 110,
- Visiting the [NDIS website](#) to view the PACE Provider Information Guide,
- Completing the [Contact and feedback form](#),
- Emailing enquiries@ndis.gov.au.