

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 1300 311 675.