

# Redesigning our systems to improve the participant experience

Provider Workshop

7 September 2022

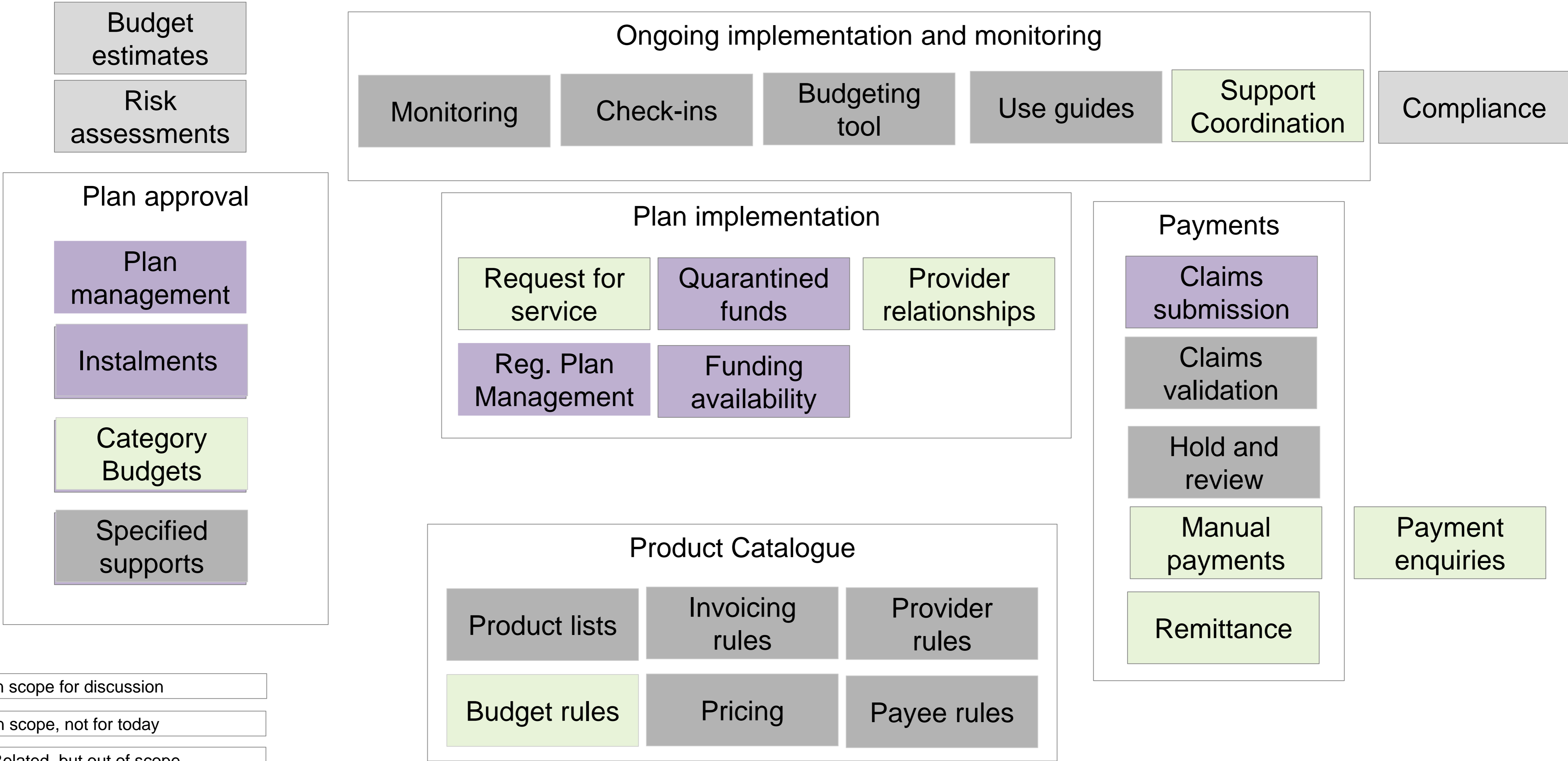
Plan Managers

**We are building a new client relationship management (CRM) system, replacing our SAP business system with a new Salesforce product, and introducing new NDIS online portals for participants and providers.**

Redesigning our systems to improve the participant experience is about:

- Improving the participant and provider experience with the NDIS and responding to feedback.
- Delivering on the Participant Service Charter, the Participant Service Guarantee and the Participant Service Improvement Plan.
- Improving our systems and internal processes, and the way we work, without changing the NDIS Act or Rules.

# System features which affect the budget-to-payment experience



- In scope for discussion
- In scope, not for today
- Related, but out of scope
- In scope and already covered

# Topics to work through with providers...

- We understand that changes will affect different types of providers differently.
- We plan to engage with providers in multiple groups to ensure we understand the impact of these different groups. This includes:
  - Service providers, plan managers and support coordinators
  - Large v small providers
  - Geographically dispersed footprints
  - Breadth of portfolio of services offered
- To ensure we approach understanding change in a controllable manner, we will limit the topics covered in any session – if matters arise relating to another topic, we will note it and resolve in a future workshop

| Topic   | Who   |
|---|---|
| Understanding impacts to making claims (Portal & API)   | All service providers (through nominated representatives)           |
| Understanding impacts on service bookings – payment assurance   | All service providers   |
| Overview of changes to budget constructs (notifications, support category budgets, flexibility and instalments) | All service providers   |
| Understanding impacts on service bookings – Viewing and administering participant plans and budgets             | Registered plan managers, Support Coordinators and Recovery Coaches |
| Using portals to “check” available budgets  | All service providers   |
| Understanding impacts on requests for service   | Support coordinators  |
| Understanding changes to managing participant budgets   | Registered plan managers  |
| Payment enquiries and dispute resolution  | All service providers   |
| Selecting a Plan Manager and the Plan Manager Role  | Plan Managers   |
| Changing Plan Managers  | Plan Managers   |

Focus of today's discussion

**Extended discussion  
regarding impacts for  
Plan Managers**

Agenda:

- *TO BE DETERMINED*

| Ref      | Category        | Sub-category                               | Title                                | Summarised Insight/Pain Point   |
|----------|-----------------|--|--------------------------------------|---|
| 220803-3 | Provider Portal | Budget Visibility<br>(Existing Pain Point) | Inability to view entire plan budget | Plan Managers are not able view approved funding for budget components that are not Plan Managed, which creates a variety of challenges (e.g., lack of clarity regarding available budget categories when processing invoices). |

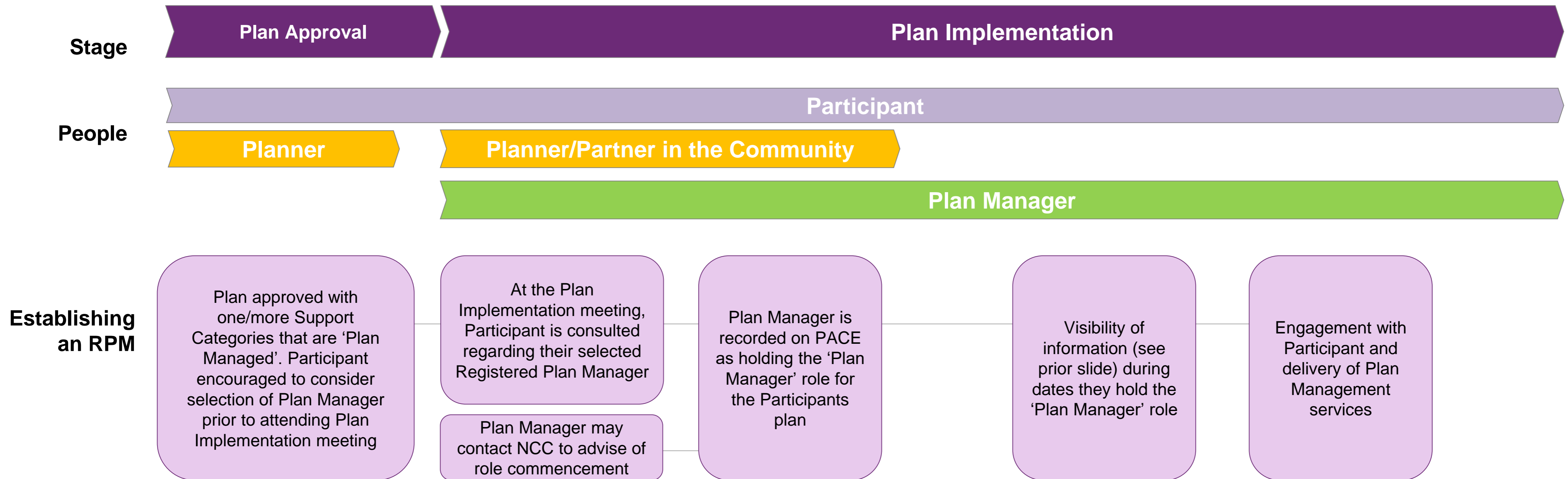
| Ref      | Category      | Sub-category | Title  | Summarised Insight/Pain Point  |
|----------|---------------|--------------|--|--|
| 220803-3 | General query | For feedback | How will funds access be impacted if a Participant changes Plan Manager during a Plan? | <ul style="list-style-type: none"> <li>Agency/Partner Staff to record the change in the Participant's nominated Plan Manager on PACE.               <ul style="list-style-type: none"> <li>Initial Plan Manager will be recorded on system with the Plan Manager role.</li> <li>If change occurs, new Plan Manager will be recorded on the system with the Plan Manager role (and as needed the prior Plan Manager role end-dated to reflect the change).</li> </ul> </li> </ul> |

Four scenarios to illustrate:

- Single Plan Manager: System Role Establishment – *covered on 24 August*
- Single Plan Manager: Claiming – *to be covered today*
- Change to Plan Manager: System Role Establishment – *to be covered today*
- Change to Plan Manager: Claiming – *to be covered today*

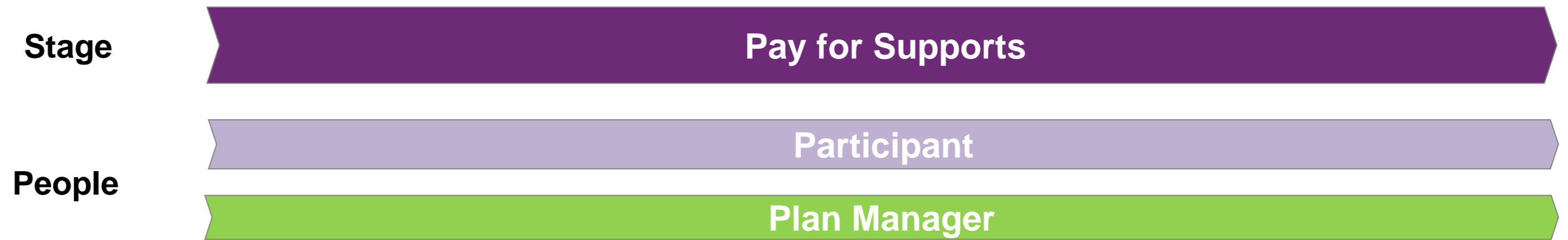
# Single Plan Manager: System Role Establishment

*Scenario 1(a): Participant approved for Plan Management of one/more Support Categories  
Participant selects Provider for recording as their Plan Manager.*



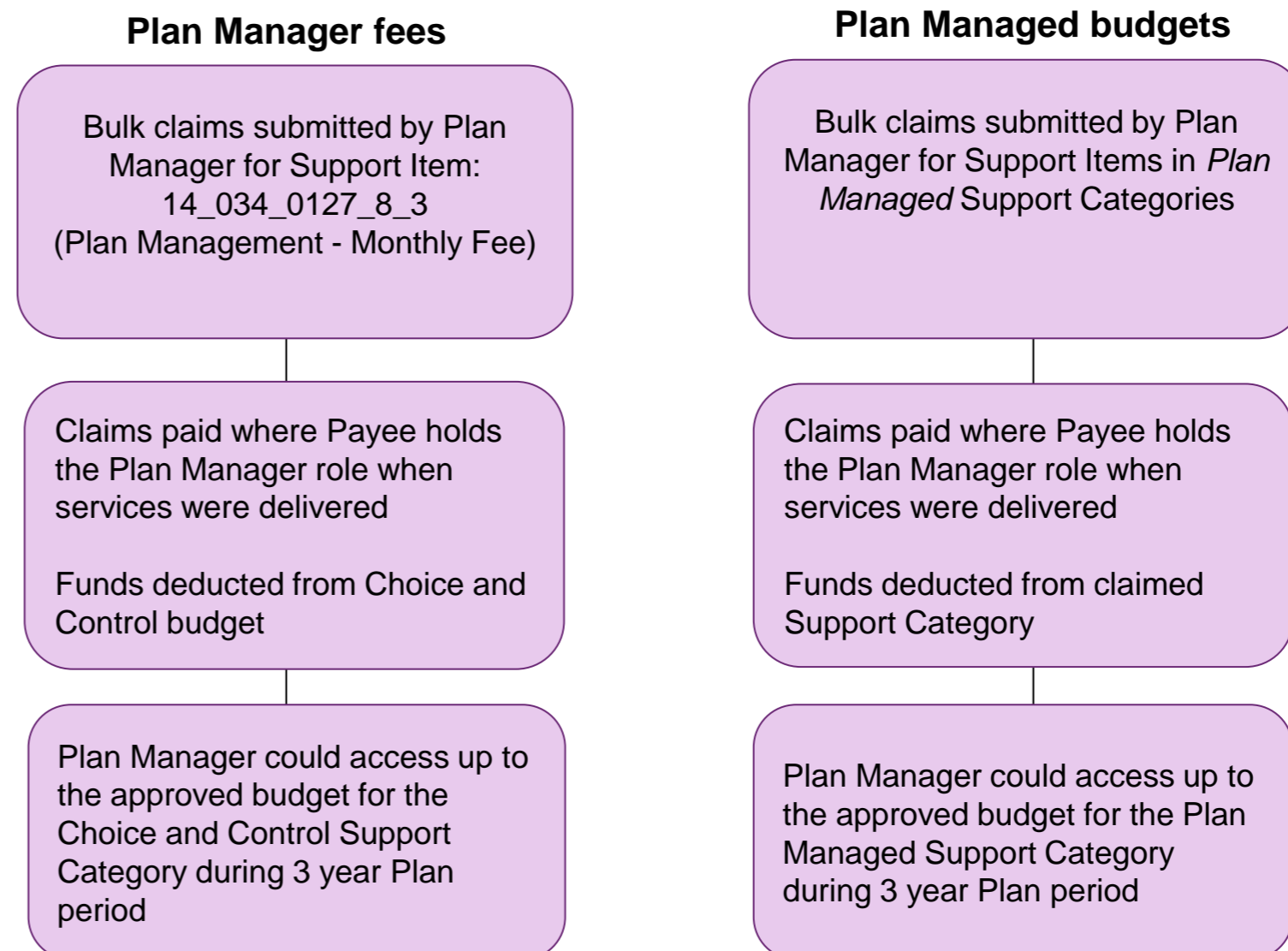
# Single Plan Manager: Claiming

*Scenario 1(b): Participant approved for Plan Management of one/more Support Categories  
 Plan Manager recorded with 'Plan Manager' role on Participant's plan  
 Claims for delivered services.*



## Background

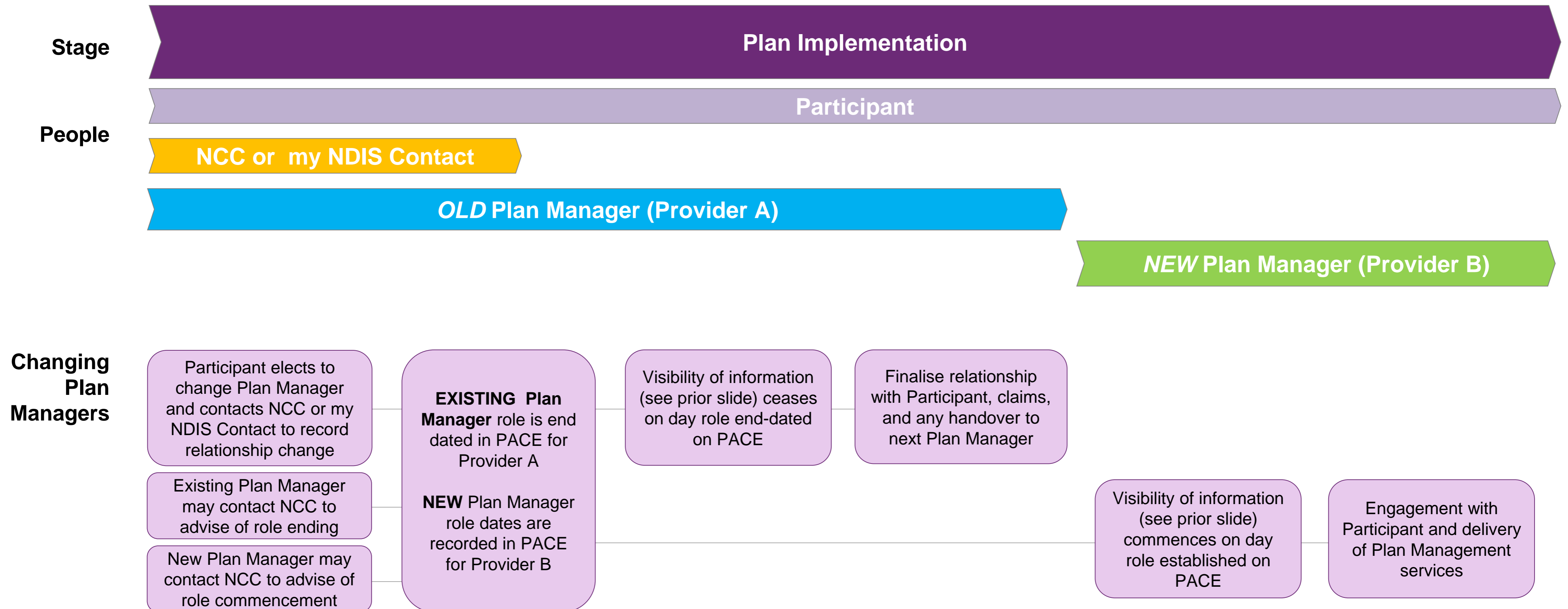
| Plan Manager Role on PACE |            |          |
|---------------------------|------------|----------|
|                           | Start Date | End Date |
| Provider                  | 1/1/23     | 31/12/25 |





# Change to Plan Manager: System Role Establishment

*Scenario 2a): Participant approved for Plan Management of one/more Support Categories  
Participant elects to change Plan Manager.*



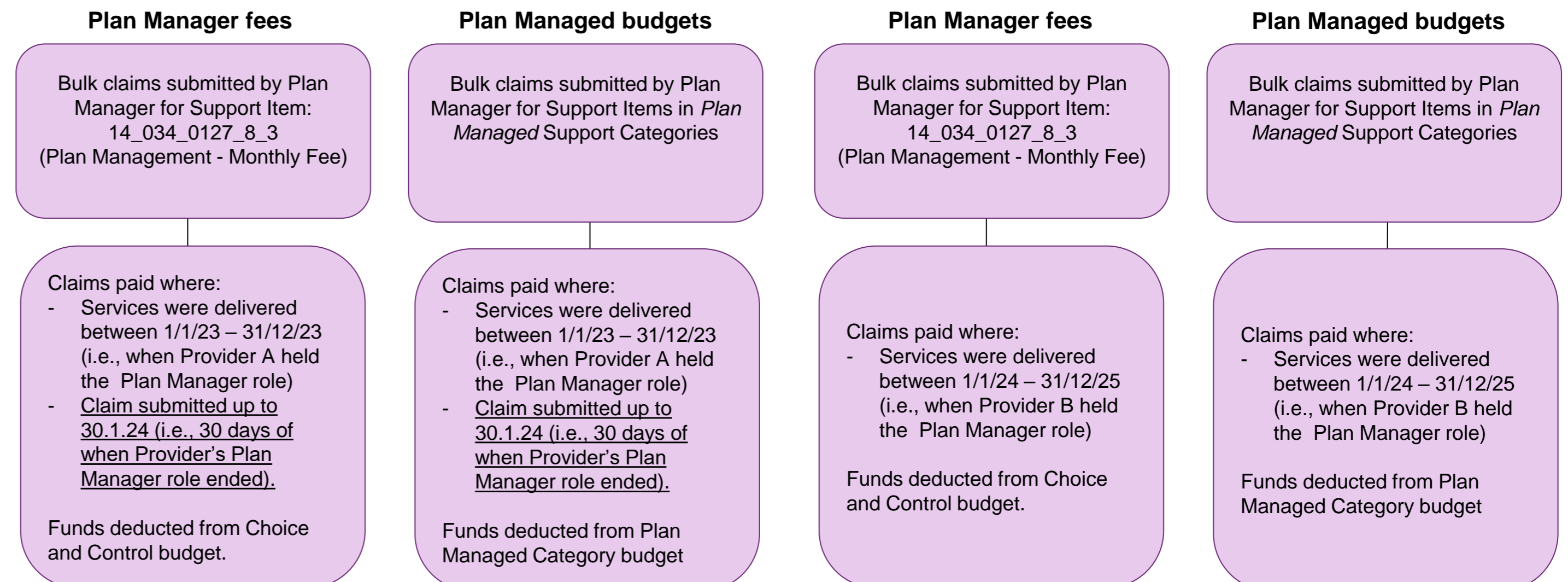
# Change to Plan Manager: Claiming

*Scenario 2b): Participant approved for Plan Management of one/more Support Categories  
Participant elects to change Plan Manager.  
Claims during transition period.*



## Background

|            | Plan Manager Role on PACE |          |
|------------|---------------------------|----------|
|            | Start Date                | End Date |
| Provider A | 1/1/23                    | 31/12/23 |
| Provider B | 1/1/24                    | 31/12/25 |



# Key Open Transition Specific Issues: Updates to be provided in future session



| Ref      | Category        | Sub-category                                 | Title  | Summarised Insight/Pain Point   |
|----------|-----------------|--|--|---|
| 220803-5 | Provider Portal | Transition period (PACE specific Pain Point) | Knowing whether a Participant's is in the current or new system. | Different information requirements between Participants in the current systems versus the new system will impact Provider business processes. |

| Ref      | Category | Sub-category                                 | Title   | Summarised Insight/Pain Point   |
|----------|----------|--|---|---|
| 220803-6 | Markets  | Transition period (PACE specific Pain Point) | Will Participants and/or Providers be allocated additional funding to support transition. | The new NDIA system will likely have a multitude of downstream resourcing impacts for Providers (e.g., staff training costs, system change costs, and potentially, additional time required to support Participants navigate the change etc). |

Session Feedback (07.09.22)

Plan Managers

3P Provider Workshops

# 1. NDIA inviting additional feedback



Please direct your feedback to [ndistransition@ndis.gov.au](mailto:ndistransition@ndis.gov.au)

| Ref                                 | Type          | Action       | Details   | Update   | Status |
|-------------------------------------|---------------|--------------|---|--|--------|
| <b>220907-2</b><br><i>Slide 8-9</i> | Claiming      | For Feedback | Timing for previous Plan Manager to claim           | - What is the right amount of time for finalising claims as the previous Plan Manager? How long should the ability to claim remain in place?                           | Open   |
| <b>220907-1</b><br><i>Slide 9</i>   | Notifications | For feedback | Notification of change of Plan Manager Relationship | - Is there a preferred timeframe/approach for notification to Plan Managers when the NDIA has received advice from a Participant of a request to change Plan Managers? | Open   |

## 2. Plan Manager identified pain points

Nil additional on 07.09.22

# 3. Plan Manager feedback



| Ref                         | Type                   | Action   | Details   | Update   | Status |
|-----------------------------|------------------------|----------|---|--|--------|
| 220907-4<br><i>Slide 10</i> | Change of Plan Manager | Feedback | •Is there an approach to escalate/report risks as part of a handover between Plan Mangers?  | •Noted for consideration in future design.   | Open   |
| 220907-3<br><i>Slide 10</i> | Change of Plan Manager | Feedback | •Where a change of Plan Manager has taken place, the new Plan Manager may need the ability to claim for a date/s where the previous plan manager was in place | <ul style="list-style-type: none"> <li>•Does it make sense for the previous Plan Manager to finalise claims they were responsible for and the new Plan Manager to manage the new claims?</li> <li>•Need flexibility for new Plan Manager to process claims that were delivered when they were not Plan Manager. As for some Plan Managers, routine practice is for existing Plan Manger to forward invoices (received after the change) to new Plan Manager where a change occurs.</li> <li>•Refer to NDIA Requesting Feedback 220907-2</li> </ul> | Closed |
| 220907-2<br><i>Slide 8</i>  | Change of Plan Manager | Feedback | Due to no Service Booking if a Plan Manager is changed mid plan what it the change over time?   | <ul style="list-style-type: none"> <li>•Dates of Plan Managers will not overlap. One will be end dated, and the new Plan Manager will have a start date.</li> <li>•There will be a role for the NDIA to engage with the Participant if the change of Plan Manager is initiated by the Plan Manager and not the Participant</li> </ul>  | Closed |
| 220907-1<br><i>Slide 8</i>  | Budget Visibility      | Feedback | Will the plan API support visibility of budgets as currently that is what Service Bookings do – determine available funds                                     | •Advice in dedicated API sessions has been to use the Budget API as this will indicate both the full and available budget  | Closed |