Ongoing Feedback

Plan Managers

3P Provider Workshops

ndis

1. NDIA requesting feedback

Please direct your feedback to ndistransition@ndis.gov.au

Ref	Type	Action	Details	Update	Status
220907-2 *Slide 8-9*	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
220907-1 *Slide 9*	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
220824-2 *Slide 7/8*	General query	For feedback	Establishing Plan Manager Relationship	- Would a process similar to an RFS be useful before the establishment of a Plan Manager relationship to allow time to accept/reject?	Open
220824-1 *Slide 6*	General query	For feedback	Plan and Budget Visibility	- Is it enough to know there is funding available for a category that is not Plan Managed, or do Plan Managers also need to know how much budget is in the non-Plan Managed category?	Open

2. Plan Manager identified pain points

Ref	Category	Sub-Category	Title	Summarised Insight/Pain Points	Update	Status
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).	Issue to be raised with Provider and Market Development Division for consideration and feedback. **UPDATE** To be discussed at future sessions.	Open
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.	Noted. The Agency has sought to minimise unnecessary changes, and is compiling resources to support end-users through the transition. The Agency is working on an API tool to support Provider identification of whether a Participant has transitioned to the new system. Details will be released to once available. **UPDATE** To be discussed at future sessions	Open
220803-4	Provider Portal	Participant budgeting tool visibility (PACE specific Pain Point)	Inability to view Participant budgeting tool	Participants may plan their expenditure using the Participant budgeting tool. Inability to view a copy of a Participant's budgeting tool (within the Provider Portal) may negatively impact on a Plan Manager's ability to support Participants to enact their fund use preferences.	Noted. Access to Participant budgeting tool outputs to be considered in future design work on Provider Portal.	Closed
220803-3	Provider Portal	Budget Visibility (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).	Noted longstanding pain point. **UPDATE 220824** *Slide 6* Ongoing conversations around plan and budget visibility to continue. Agency commitment to return this conversation for a future agenda including the Agency Policy team.	Open
220803-2	Portals	Engagement of a Plan Manager (PACE specific Pain Point)	Notification of intent to engage a Plan Manager	Currently, Plan Managers use service bookings to indicate that they are they have been engaged by a participant. With removal of Service Bookings, there may be delays between when a participant notifies NDIA and when the Plan Manager is engaged. Suggestion is for Plan Managers to have the ability to notify Agency of intent to engage as a safety net.	Noted. A notification of intent to engage (i.e., Plan Manager/Participant 'push' intent to engage notification to Agency/Partner to inform Plan Implementation Meeting) concept will be considered in future design work on the Portals. A notification to the nominated Plan Manager, once they are record on system, is being considering in present design.	Closed

2. Plan Manager identified pain points

Ref	Category	Sub-Category	Title	Summarised Insight/Pain Points	Update	Status
220803-1	Portals	Recording changes (PACE specific Pain Point)	Self-service for recording Plan Manager changes	Where Participant seeks to change their nominated Plan Manager, Participant required to contact the Agency/Partner to have the change recorded within the PACE system Plan.	Noted. Will be factored into consideration for future design work on Participant/Provider Portal.	Closed

3. Plan Manager feedback

Ref	Type	Action	Details	Update	Status
220907-4 *Slide 10*	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 *Slide 10*	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	•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? •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. •**Working assumption is 30 days, with need to be able to be varied in some circumstances.** •Refer to NDIA Requesting Feedback 220907-2	Closed
220907-2 *Slide 8*	Change of Plan Manager	Feedback	Due to no Service Booking if a Plan Manager is changed mid plan what it the change over time?	•Dates of Plan Managers will not overlap. One will be end dated, and the new Plan Manager will have a start date. •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	Closed
220907-1 *Slide 8*	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

3. Plan Manager feedback

Ref	Type	Action	Details	Update	Status
220824-7 *Slide 8*	Plan Manager role establishment	For feedback	•What is the intended benefit/outcome of making the change to introducing a Plan Implementation meeting and the associated processes?	• Increased Participant engagement and therefore increased Plan utilisation and Participant outcomes. The significant impact for Providers is noted and further consideration is to be given to alternative future design options to establish the Plan Manager role, including self-service options.	Closed
220824-6 *Slide 8*	Plan Manager role establishment	For feedback	•How will the agency ensure that staff are not preferentially recommending from a 'preferred' short-list? As this could impact free market dynamics.	• Risk of preferential recommendations are to be worked through further. • See 220803-5 for more details.	Closed.
220824-5 *Slide 8*	Plan Manager role establishment	For feedback	What occurs if Participant doesn't list engagement Plan Manager?	• Plan Manager could contact Agency to advise of relationship. • Note, Agency commitment to explore alternative options to relationship establishment.	Closed.
220824-4 *Slide 6*	Information access	For feedback	Would be good for Plan Manager to know of financial nominee/legal representatives etc.	• Noted benefit of knowing such information. • To be factored into future design considerations, along with Policy considerations for consent to access such information.	Closed.
220824-3 *Slide 6*	Information access	For noting	With introduction of PoS, if role of Plan Manager is to shift more towards helping Participant to use their Plan, additional information would support Plan Manager to undertake support role.	• Noted. Any impacts/implications of POS are still being worked through.	Closed.
220824-2 *Slide 6*	Information access	For noting	Why can't Plan Managers access all Plan/Budget information.	• A balance is required to support privacy of Participant information alongside the information that Plan Manager requires to execute their role. • Policy considerations are underway regarding the balance, and any implications would be factored into future design considerations for PACE.	Closed.
220824-1 *Slide 6*	Plan and Budget Visibility	For noting	Useful for Plan Managers to have access/visibility of all supports for a participant to ensure they are being supported accordingly. Understand privacy constraints but difficult for a Plan Manager to do their job well when they don't have full visibility.	• Limited visibility does not allow the Plan Manger to see the full Participant eco system to provide fulsome support. Individual pieces is not always helpful, the full picture is. • Understanding what other budgets have been allocated for – e.g. agency managed and plan managed components of the same Plan. • Is there consideration for approaches to make consent from Participants/Representatives easier to obtain? • Reference to 220803-6 Pain Point.	Open

3. Plan Manager feedback

Ref	Type	Action	Details	Update	Status
220803-8	General query	For Feedback	How will budget be displayed to Participants?	•A Participant Portal budgeting tool will display budgets, and support Participants to plan expenditure.	Closed
220803-7	General query	For feedback	With budgets at a category level, how will Supported Independent Living (SIL) funding to treated?	•SIL is expected to be a distinct Support Category.	Closed
220803-6	General query	For feedback	Is the presented PACE system function finalised, and will there be follow-up sessions?	•The PACE system design and build is significantly progressed to enable the Agency to provide a baseline view of the new system to inform discussions with stakeholders regarding benefits and limitations. The PACE system is not finalised, and the design is evolving. The purpose of engaging with Plan Managers (and other Provider stakeholders) is to understand the potential impacts, collect feedback, and incorporate this feedback into design considerations for initial release and subsequent enhancements. •Follow-up sessions are planned to provide further details and obtain further feedback. •Simulated user testing is planned for later in 2022, with feedback from this testing to be incorporated. Subsequently, real-world end-to-end pilot testing will be undertaken prior to any large-scale implementation. Pilot timelines will be dependant on testing outcomes.	Closed
220803-5	General query	For feedback	Is there a risk that Agency/Partner staff may influence Participant choice of Plan Manager?	•Following a Planning meeting, where Plan Managed has been approved for supports, the Participant will be encouraged to investigate Plan Manager options and bring a nominated Plan Manager to their Plan Implementation meeting (for recording). The Participant remains responsible for identifying potential Plan Managers and making the choice of which Plan Manager to nominate (with the Agency then recording the Participant's choice). •Where a Participant has not selected a Plan Manager, they will be supported to access the Agency's published resources, such as the Provider Finder, to guide their independent identification and selection of a Plan Manager. •Staff Plan Implementation guidance materials to be reviewed in relation to nature of support provided.	Closed

3. Plan Manager feedback

Ref	Type	Action	Details	Update	Status
220803-4	General query	For feedback	Why has the change in how a Plan Manager is recorded been made?	•The removal of Service Bookings required consideration of a new process. •Feedback from Participants has highlighted the benefit of additional support for Plan Implementation. As a result, the Agency has prioritised development of a Plan Implementation meeting to more comprehensively support Participants. When considering the removal of Services bookings, recording of a Plan Manager was considered most suitable during a Plan Implementation meeting.	Closed
220803-3	General query	For feedback	How will funds access be impacted if a Participant changes Plan Manager during a Plan?	•Agency/Partner Staff to record the change in the Participant's nominated Plan Manager on PACE. •Initial Plan Manager will be recorded on system with the Plan Manager role. •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).	Open
220803-2	General query	For feedback	How will instalment funds flow to a Plan Manager?	•Service booking no longer required. Plan Manager access to funds is facilitated via recording the specific Provider as the nominated Plan Manager within the PACE Plan. •For new Participants, when a Plan Manager has been selected by a Participant and recorded on a Participant's PACE Plan (as part of a Plan Implementation meeting), that recorded Plan Manager will have access to funds in Plan Managed Support Categories. •For existing Participants, where an existing Plan Manager relationship is in place, unless notified otherwise, when a Participant transitions to the PACE system, the existing Plan Manager will be recorded as the Plan Manager on the new PACE Plan.	Closed
220803-1	General query	For feedback	How will instalments works?	•See 3.8.222 Supplementary Slide 2	Closed