

Redesigning our systems to improve the participant experience

Provider Workshops

Support Coordinators and Recovery Coaches

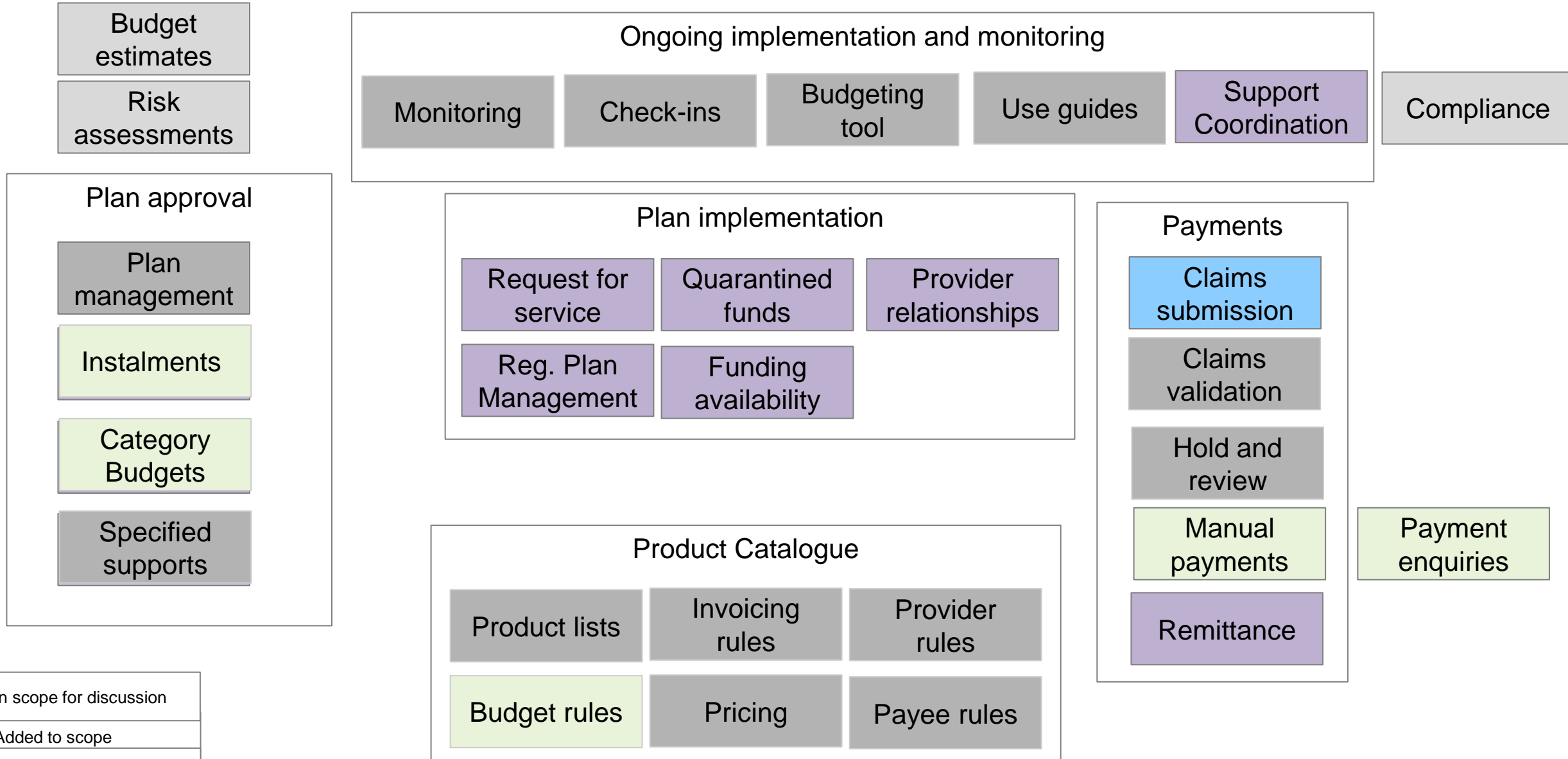
8 September 2022

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
	Added to scope
	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
Payment enquiries and dispute resolution	All service providers
RFS consent and information visibility, budgets and claiming.	Support Coordinators
Reporting and Budgets	Support Coordinators
Changing Providers	Support Coordinators

Focus of today's discussion

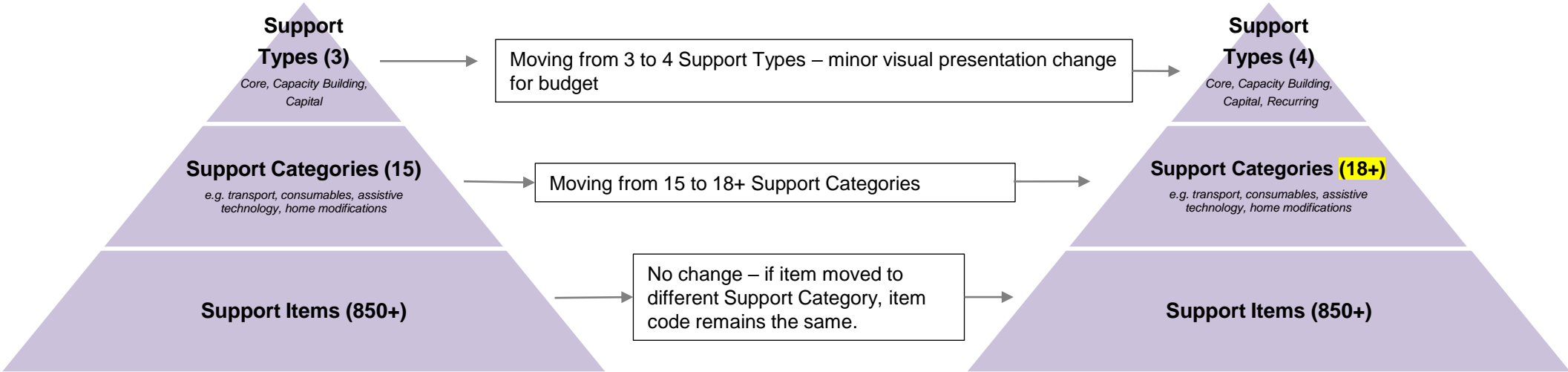
**Extended discussion
regarding impacts for
Support Coordinators
and Recovery Coaches**

Agenda:

- Discussion on key open Pain Points/Feedback
 - Budget Structure
 - Changing Providers

CURRENT SAP PRODUCT CATALOGUE HIERACHY

PACE PRODUCT CATALOGUE HIERACHY



Product Catalogue (updated draft)

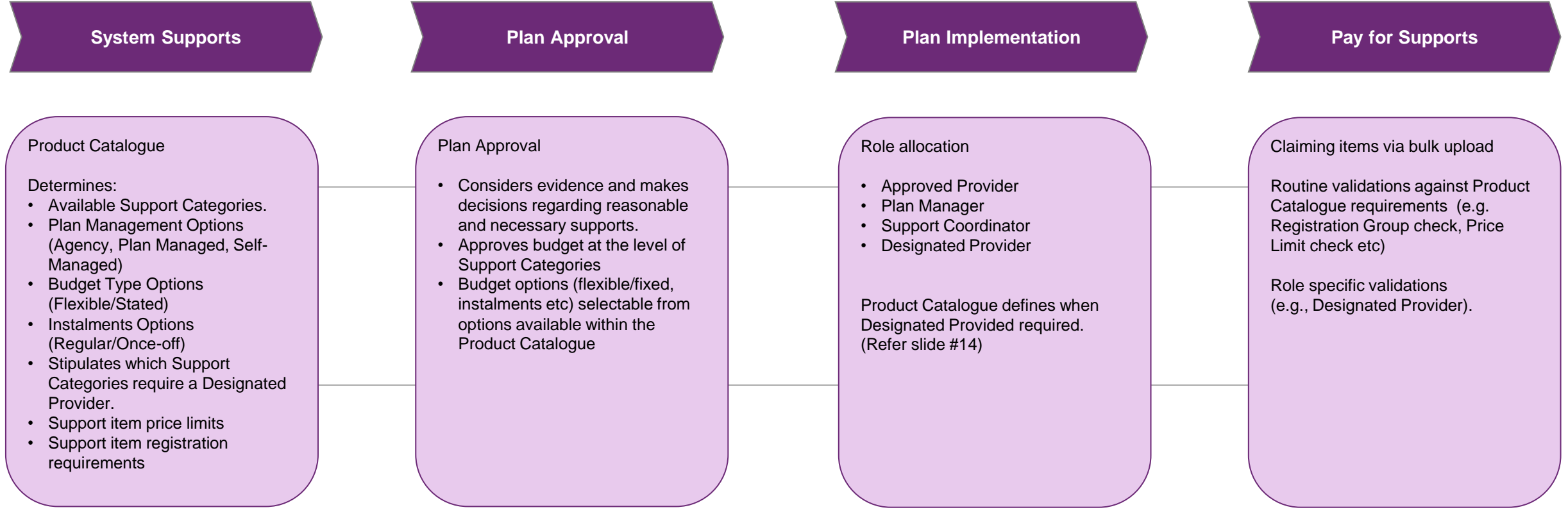


Support Category Code	Support Category	Support Type	Default Plan Management Type	Plan Management Type Options	Default Budget Type	Budget Type Options	Default Instalment Type	Instalment Type Options	Designated Provider
01	Assistance with Daily Life	Core	Agency managed	Self managed; Agency managed; Registered Plan Manager	Flexible	Flexible; Stated	Regular	Regular	-
16 (new)	Shared Living Support	Core	Agency managed	Self managed; Agency managed; Registered Plan Manager	Stated	Flexible; Stated	Regular	Regular	-
02	Transport	Core	Agency managed	Self managed; Agency managed; Registered Plan Manager	Flexible	Flexible; Stated	Regular	Regular	-
03	Consumables	Core	Agency managed	Self managed; Agency managed; Registered Plan Manager	Flexible	Flexible; Stated	Regular	Regular	-
04	Assistance with Social, Economic and Community Participation	Core	Agency managed	Self managed; Agency managed; Registered Plan Manager	Flexible	Flexible; Stated	Regular	Regular	-
05	Assistive Technology	Capital	Agency managed	Self managed; Agency managed; Registered Plan Manager	Stated	Stated	Once-off	Once-off; Regular	-
19 (new)	Assistive Technology Repairs and Rental	Capital	Agency managed	Self managed; Agency managed; Registered Plan Manager	Stated	Stated	Regular	Once-off; Regular	-
06	Home Modifications	Capital	Agency managed	Self managed; Agency managed; Registered Plan Manager	Stated	Stated	Once-off	Once-off	-
17 (new)	Specialised Disability Accommodation (SDA)	Capital	Agency managed	Agency managed	Stated	Stated	Regular	Once-off; Regular	Yes
07 (edit)	Support Coordination and psychosocial recovery coaches	Capacity Building	Agency managed	Self managed; Agency managed; Registered Plan Manager	Stated	Stated	Regular	Once-off; Regular	-
08	Improved Living Arrangements	Capacity Building	Agency managed	Self managed; Agency managed; Registered Plan Manager	Stated	Stated	Regular	Once-off; Regular	-
09	Increased Social and Community Participation	Capacity Building	Agency managed	Self managed; Agency managed; Registered Plan Manager	Stated	Stated	Regular	Once-off; Regular	-
10	Finding and Keeping a Job	Capacity Building	Agency managed	Self managed; Agency managed; Registered Plan Manager	Stated	Stated	Regular	Once-off; Regular	-
11	Relationships	Capacity Building	Agency managed	Agency managed	Stated	Stated	Regular	Once-off; Regular	-
20 (new)	Behaviour Support	Capacity Building	Agency managed	Agency managed	Stated	Stated	Regular	Once-off; Regular	Yes
12	Health and Wellbeing	Capacity Building	Agency managed	Self managed; Agency managed; Registered Plan Manager	Stated	Stated	Regular	Once-off; Regular	-
13	Lifelong Learning	Capacity Building	Agency managed	Self managed; Agency managed; Registered Plan Manager	Stated	Stated	Regular	Once-off; Regular	-
14	Choice and Control	Capacity Building	Agency managed	Agency managed	Stated	Stated	Once-off	Once-off; Regular	-
15	Improved Daily Living Skills	Capacity Building	Agency managed	Self managed; Agency managed; Registered Plan Manager	Stated	Stated	Regular	Once-off; Regular	-
18 (new)	Transport Recurring	Recurring	Self managed	Self managed	Stated	Stated	Recurring	Recurring	-

QUESTION FOR FEEDBACK:
Are there categories that contain different levels of risk if they are split?



The Product Catalogue determines the possible budget structure and defines various controls for claiming



Payments: What we've heard from providers so far...

Budget availability

Design features to be included are...

- “what if” APIs which simulate whether a transaction would be paid, prior to providing service
- Proactive MyNDIS Contact check-ins where budget availability is getting low

Further options to explore are....

- Sharing of available budget on redesigned portals
- Checks on whether aggregated service agreements exceed total budget for Agency Managed budgets
- Indicators for whether service should be directly claimed or claimed via plan manager.

Risk of services not being coordinated or overutilised

- Approved Providers for plans with Agency Managed budgets
- Allow multiple providers to be listed against ‘designated’ budgets to account for multidisciplinary service responses

- Ability to load service agreements (for providers and participants) in case of dispute
- Providing feedback into policies being developed on the role of plan managers (including registered plan managers, self-managers, and the NDIA)

Budget changes

- Capture of plan sharing consent to as part of the process to establish Approved Provider relationship

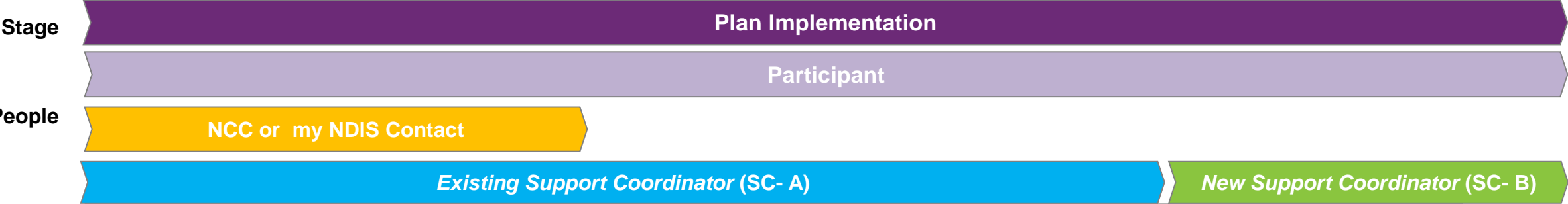
- Notification to existing providers that funding or plan management approach has changed

Changing Support Coordinators

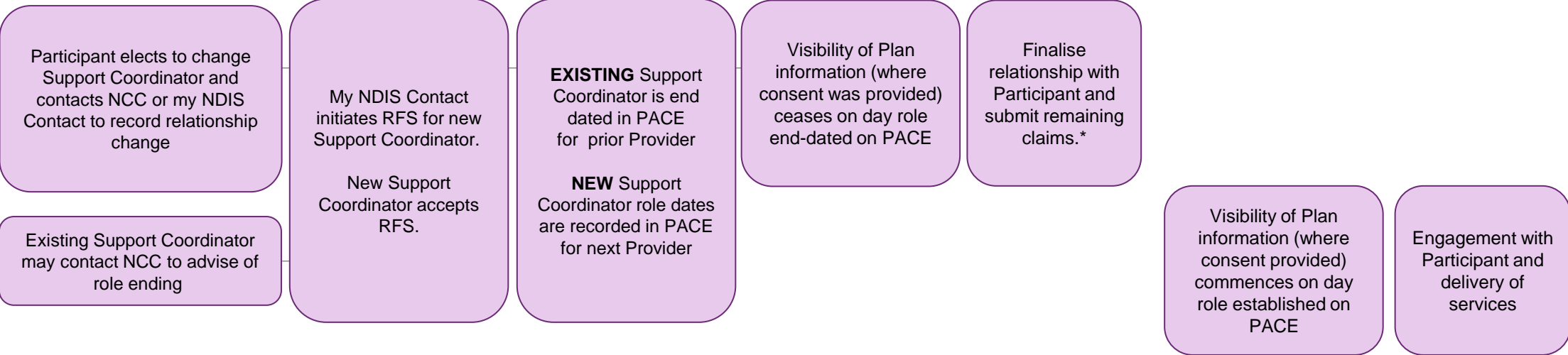
Automated Service Provider notifications of changes and self-service role addition/removal are being considered for future enhancements



Scenario: Participant approved for Agency Managed Supports. Participant elects to change Support Coordinator



Changing Approved/ Designated Providers



*Claims (for services delivered during period of appointment) can be submitted by a Provider after their Support Coordinator role is end-dated.

Session Feedback (08.09.22)

Support Co-ordinators and Recovery
Coaches

3P Provider Workshops

1. NDIA inviting additional feedback

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

Ref	Type	Action	Details	Update	Status
220908 – 1	General	For feedback	Naming of support category	<ul style="list-style-type: none">- Is there further feedback/suggestions on the new support category name “Shared Living Support”?<ul style="list-style-type: none">- <i>For example “Home and Living Supports”</i>- Is there further feedback/suggestions on the new support category name “Relationships”?<ul style="list-style-type: none">- <i>For example “Building and maintaining relationships”</i>	Open

2. Support coordinator identified pain points

Nil on 08.09.22

3. Support Coordinator feedback



Ref	Type	Action	Details	Update	Status
220908 – 22 <i>Slide 10</i>	Changing Support Coordinators	For feedback	Can Support Coordinator/Recovery Coach submit claims after relationship ends?	<ul style="list-style-type: none"> Yes – for services delivered during period of appointment. The slide will be updated to enhance clarity. Post Session note: Slide updated to enhance clarify.	Closed
220908 – 21 <i>Slide 10</i>	Changing Support Coordinators	For feedback	The ending of a role would impact Service Booking – how has this been considered?	<ul style="list-style-type: none"> There will be no need for Service Bookings within PACE. 	Closed
220908 – 20 <i>Slide 10</i>	Changing Support Coordinators	For noting	Where a relationship is being ended, it would be useful for the Participant to be able to provide a reason for ending the relationship and for that reason to be visible to the Provider.	<ul style="list-style-type: none"> Noted Will be factored into considerations for future design work. Further work on policy considerations would be required regarding consent options for possible disclosure of reason(s) for ending relationship. 	Closed
220908 – 19 <i>Slide 10</i>	Changing Support Coordinators	For noting	Notifications of intent to change Support Coordinator would be useful to support additional time to finalise relationship.	<ul style="list-style-type: none"> Noted Will be factored into considerations for future design work. 	Closed
220908 – 18 <i>Slide 8</i>	Service Agreements	For noting	There could be merit in service agreements being attached to a Participant's account where the Provider is recorded as an Approved Provider. And having Service Agreements linked to Support Categories.	<ul style="list-style-type: none"> Noted the benefit for Support Coordinator visibility of which providers are delivering which services. The uploading of Service Agreements will be factored into considerations for future design work. Further work on policy considerations would be required regarding consent options for possible: <ul style="list-style-type: none"> Sharing of Service Agreements beyond the parties to the Agreement. Sharing of who are the Approved Providers/Designated Providers. 	Closed
220908 – 17 <i>Slide 8</i>	Support items	For feedback	Plan Managers can be funded to provide education on plan use. Will Support Coordinators also be funded to delivery similar services?	<ul style="list-style-type: none"> Existing Support Items will remain, and as such, if such services are available for delivery by Support Coordinators presently, they will be continue to be available within PACE. Post Session note: The following item is currently listed as a legacy Item within the Support Catalogue. There will be nil change, apart from positioning as a legacy item associated with the 'Support Coordination and Psychosocial Recovery Coaches' category. <ul style="list-style-type: none"> 07_003_0117_8_3 (CB and Training in Plan and Financial Management by a SupportCoordinator) 	Closed

3. Support Coordinator feedback

Ref	Type	Action	Details	Update	Status
220908 – 16 <i>Slide 8</i>	Support delivery	For feedback	Can there be more than one Support Coordinator?	<ul style="list-style-type: none"> A Participant could concurrently have two different Support Coordinators. Both would be required to be established on the system with Support Coordinator roles. 	Closed
220908 – 15 <i>Slide 6 and 7</i>	Support Categories	For feedback	Does Level 3 Support Coordination require Registered Providers, and if so, would the associated category need to always be Agency Managed?	<ul style="list-style-type: none"> Level 3 Support Coordination doesn't require Registered Providers under the NQSC but it is often Agency Managed through the planning process. The Support Coordination and Psychosocial Recovery Coaches category is expected to have all three Plan Management Types as options. 	Closed
220908 – 14 <i>Slide 6 and 7</i>	Support Categories	For feedback	Will Behavioural Support require a Designated Provider?	<ul style="list-style-type: none"> Currently it is proposed that Behavioural Support will require a Designated Provider. This would required the Service Provider to have a role established on the system denoting their Service Provider relationship with the Participant for delivery of these specific services. 	Closed
220908 – 13 <i>Slide 6 and 7</i>	Support Categories	For feedback	Why is Recurring Transport self-managed?	<ul style="list-style-type: none"> Recurring Transport is an atypical Support Category, as it largely serves as a system tool to facilitate payment of what is currently termed 'Periodic Transport'. As such, the category has been allocated settings to support payments directly to Participants. 	Closed
220908 – 12 <i>Slide 6 and 7</i>	Support Categories	For feedback	What is the default instalment type of Assistive Technology Repairs and Rental?	<ul style="list-style-type: none"> Assistive Technology Repairs and Rental should have a proposed default instalment of 'Regular' to reflect the intent on this support. 	Closed
220908 – 11 <i>Slide 6 and 7</i>	Support Categories	For feedback	Whilst it makes sense for Behaviour Support to be Agency Managed, why is Relationships Agency Managed? Does it still require a Registered Provider?	<ul style="list-style-type: none"> This is a typographical error that will be corrected. Relationships is expected to have all three Plan Management Types as options. 	Closed
220908 – 10 <i>Slice 6 and 7</i>	Support Categories	For feedback	For the Support Coordination and Recovery Coaches category, can funds be used for both Support Coordination and Recovery Coaching, or just one or the other?	<ul style="list-style-type: none"> Budget approved for the category can be used for any support item contained within the category. If the Participant has funding for this category, it could be concurrently used for Support Coordination services and Psychosocial Recovery Coaching services. 	Closed

3. Support Coordinator feedback

Ref	Type	Action	Details	Update	Status
220908 – 9 <i>Slide 6 and 7</i>	Support Categories	For noting	Post the split, the category name of 'Relationships' would benefit from reconsideration. The present category name does not clearly communicate the support category intent.	<ul style="list-style-type: none"> Noted. The name will be considered further with a view towards enhancing clarity. 	Closed
220908 – 8 <i>Slide 6 and 7</i>	Support Categories	For noting	The split to Relationships to create two categories seems reasonable.	<ul style="list-style-type: none"> Noted. 	Closed
220908 – 7 <i>Slide 6 and 7</i>	Support Categories	For feedback	Does Behaviour Support include the supports that have to be delivered by a Registered Provider?	<ul style="list-style-type: none"> Yes, this category was split from Relationships to support segmentation of the specialist behavioural supports that are required to be delivered by Registered Providers. 	Closed
220908 – 6 <i>Slide 6 and 7</i>	Support Categories	For noting	The split out of 'Assistive Technology Repairs and Rental' seems reasonable.	<ul style="list-style-type: none"> Noted. 	Closed
220908 – 5 <i>Slide 6 and 7</i>	Support Categories	For noting	Low cost AT is not always low risk. There can be many scenarios where the low cost item may pose a significant risk.	<ul style="list-style-type: none"> Noted 	Closed
220908 – 4 <i>Slide 6 and 7</i>	Support Categories	For feedback	Will 'Low coast AT' remain within Consumables given the additional 'Assistive Technology Repairs and Rental' category?	<ul style="list-style-type: none"> Yes, flexibility is proposed to be maintained for low cost AT. 	Closed
220908 – 3 <i>Slide 6 & 7</i>	Support Categories	For noting	Increase in the number of categories available may allow a plan to be managed more easily.	<ul style="list-style-type: none"> Noted 	Closed
220908 – 2 <i>Slide 6 and 7</i>	Support Categories	For noting	'Home and Living' sounds more suitable than 'Shared Living Supports' and also aligns with redesign work information.	<ul style="list-style-type: none"> Noted 	Closed
220908 – 1 <i>Slice 6 and 7</i>	Support Categories	For noting	The inclusion of Independent Living in a new Category with the name 'Shared Living Supports' is confusing.	<ul style="list-style-type: none"> Noted. The name is being considered for revision to 'Home and Living' 	Closed