NDIS Business Processes

Policy and Procedures

Note: This policy needs to be tailored to the circumstances of each organisation, including the supports provided, what job roles it has, and what systems are in use.

# Policy

<Insert name of organisation> will operate efficiently, effectively and in line with NDIS operating guidelines and Terms of Business.

# Procedures

The following procedures are to be implemented.

**NDIS Registration and NDIS Provider Portal Access**

* <Insert title of position> will review the NDIS Provider Toolkit as updated, including the Terms of Business for Registered Support Providers, to ensure required practices are in line with NDIS registration requirements.
* <Insert title of position> is identified and designated the role of NDIS Portal Manager. This position will identify those staff that require access to the Provider Portal and organise for them to register for PRODA, then allocate their access level within the Portal.
	+ <Insert title of position> will monitor Portal business and any NDIS alerts via the portal.
	+ <Insert title of position> is responsible for monitoring updates from the NDIA regarding registration status, provider requirements and portal management.

**Marketing**

* <Insert title of position> will be responsible for the development and implementation of marketing and promotional strategies.

**Staff Structure and Engagement strategy with <Insert name of provider> staff**

* <Insert title of position> will ensure all staff are aware of <Insert name of provider> systems and processes that have been established for operating within the NDIS, including being able to explain what <Insert name of provider> can offer and how to engage with current and prospective customers.
* <Insert title of position> will monitor sector information and training opportunities to share with staff to facilitate their skill and knowledge development around NDIS practices relevant to <Insert name of provider>.
* <Insert name of team, for example, Customer Service Team> will be responsible for the development of a pre-planning support model.
* <Insert title of position> will provide training to relevant staff to implement pre-planning to meet transition timelines.
* <Insert name of team, for example, Customer Service Team> will offer pre-planning to all current customers.

**Engagement strategy with <Insert name of provider> customers entering the NDIS**

* <Insert title of position> will develop and implement a communication plan for <Insert name of provider> for changes in service offerings under the NDIS to current customers. This will include web, face-to-face information sessions and written material.
* <Insert name of team, for example, Customer Service Team> will offer support to current customers to attend NDIS planning meetings.
* <Insert title of position> will be responsible for regular updating of customers on NDIS news and information.

**Engagement strategy with new/potential <Insert name of provider> customers entering the NDIS**

* <Insert name of team, for example, Customer Service Team> will develop a process for responding to requests for information from new customers regarding the NDIS including providing assistance with checking NDIS eligibility.

**Customer Information Management Systems**

* <Insert title of position> will develop and monitor an entry point and tracking system for all customer enquiries and responses, which includes generating quotes, service agreements and associated work flows for customer business processes.
* <Insert title of position> will ensure customer information management and record systems identify a ‘single source of truth’ for customer data. This includes service delivery tracking systems that records services delivered and meets NDIA audit requirements.