

# How to Provide Consent to Share Your NDIS Plan



Trio Plan Management requires your consent to access your plan on the NDIS system. To give your consent, please log into the NDIS section on your myGov online account. This will take you to the NDIS myplace participant portal.

Information on how to create your myGov online account, is available here:

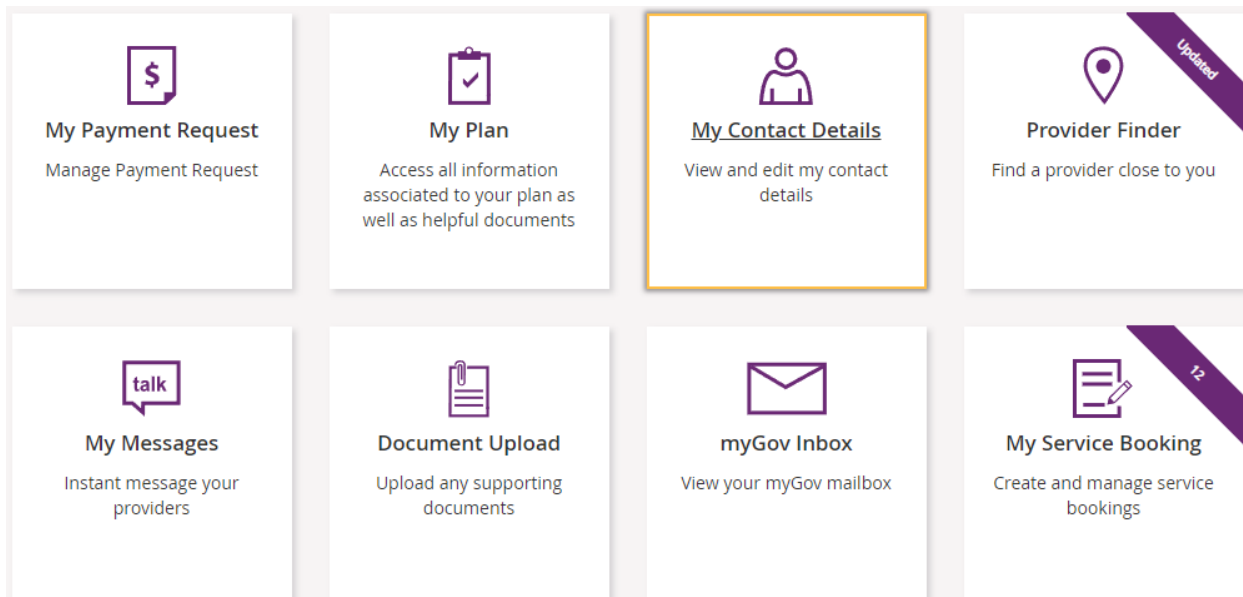
[How to create your myGov online account](#)

Information on how to link your NDIS myplace portal to your myGov, is available here:

[How to link NDIS myplace to myGov](#)

Please Note: if you are unable to access myGov or your NDIS myplace online portal, please contact Trio Plan Management for a form to complete that can be submitted to the NDIS via email, post or in person.

Once you have accessed your NDIS myplace portal, scroll down to the bottom of the screen and click the “My Contact Details” section. It looks like this:



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A page will appear that looks like this:



Home / My Contact Details

## My Contact Details

Edit your contact details below

Required fields are marked with an asterisk (\*)

▼ [Open all sections](#)    ^ [Close all sections](#)

About Me

▼ Open Section

How Can NDIA Contact Me?

▼ Open Section

How Can I Contact NDIA?

▼ Open Section

My Address Details

▼ Open Section

Share My Plan

▼ Open Section

My Bank Details

▼ Open Section

▼ [Open all sections](#)    ^ [Close all sections](#)

# How to Provide Consent to Share Your NDIS Plan



Click the “Share My Plan” section to open it, the section will look similar to this:

## Share My Plan Close Section

### Share plan with Providers

Providers **will see**

- Personal information (name, preferred name, gender, NDIS number, date of birth and if an interpreter is required)
- Goals
- Plan start and end date
- Nominee information (if supplied)

Providers **will not see**

- Support items and items codes
- Budget details

Providers with an active service booking are listed below. Please select providers to share plan with.

Trio Plan Management

Share plan details with all new providers whenever a new service booking is created

### Share plan with Plan Manager

Plan Manager **will see**

- Personal information (Name, Preferred Name, Gender, NDIS No, Date of Birth and if an interpreter is required)
- Goals
- Plan start and end date
- Nominee information (if supplied)
- Current plan details (support purpose and category, support items and items codes, if support is stated or quotable and budget details)

**Why are you updating or changing who can see the plan?\***

Provide the reason for updating who can see the plan (Max 240 characters)

[Show changes to who can see the plan](#) Submit

# How to Provide Consent to Share Your NDIS Plan



Under the “Share plan with Providers” area, please click the box next to Trio Plan Management so a blue tick appears.

Under the “Share plan with Plan Manager” area, please click the box so a blue tick appears.

You will need to enter a reason why you are updating or changing who can see your plan. You can enter “New plan manager” as a reason in this field.

The reason why Trio Plan Management needs to see your plan on the NDIS system is so we can access the current plan details including support purpose and category, support items and item codes, if the support is stated or quotable and budget details. Some of this extra information, such as support codes, is not included in the version of the NDIS Plan that is provided to the participant, as this information is only used for invoicing and processing claims.

We are happy to discuss any questions you may have or to guide you through the consent process.

Call us: 0410 332 133

Email us: [admin@trioplanmanagement.com.au](mailto:admin@trioplanmanagement.com.au)

You can find our Feedback Form, Privacy Policy and other useful information on our website: [trioplanmanagement.com.au](http://trioplanmanagement.com.au).

For more information on the NDIS myplace portal, you can access a handy guide here:

[NDIS Website - How to use the myplace portal](#)