NDIS myplace provider portal

Step-by-Step Guide

Part 2. Maintaining your information

May 2019
Changes from the last version

The following updates have been made to the last published version of this document:

- Update to align with latest version of the portal
- Reorganised for readability.
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Maintaining your information

These functions enable you to:

- View and manage your Profile (your and your organisation’s contact information and roles within the provider portal).
- Maintain your Registration details (the services you are approved to provide under the NDIS).¹
- Manage your Outlets (the times and places from which you deliver services).²
- Manage the organisations which Link to my Organisation (the organisations you work for).

¹ Maintain Registration details is only available in jurisdictions which have not yet transitioned these functions to the NDIS Quality and Safeguards Commission (VIC, QLD, ACT, NT, TAS and WA).
² Maintain outlets is only available in jurisdictions which have not yet transitioned these functions to the NDIS Quality and Safeguards Commission (VIC, QLD, ACT, NT, TAS and WA).
Profile

This allows you to view and update your personal details, and view (and update if you are the account manager for your organisation) your organisation details, organisation staff and bank details.

1. Select the Profile tile on the myplace home page, or the Person icon from other pages.
2. The **Profile** page displays. Use the **Open** and **Close** section buttons to see all the information.
About me

1. Select **Edit** in the **About Me** group to update your telephone numbers and email address.

![Profile section](image)

2. Enter your changed details and select **Update**.
Note: If you do not wish to update your details, select **Cancel**. You can only change phone numbers and the email address.

**My organisation details**

1. View name and contact information for your organisation in the **My Organisation Details** section. Select **Edit** to update whether the provider should display in the Provider Finder, and if so whether the address should also be displayed.
**Note:** The following steps are only available if you are the account manager for your organisation.

2. Select ‘Yes’ if the provider should display in the Provider Finder, and if so whether the address should also be displayed. Then select **Update**.
How Frequently Can NDIA Contact Me?
Nominate how often your organisation wants to be notified about changes to service bookings and quotations. You can choose to be notified:

- Immediately
- Daily
- Weekly
- Never

**Note:** You will only be notified about service bookings and quotations that your organisation needs to action.
1. Select ‘Open Section’ to view or edit your information.

2. Select **Edit** to update your preferred frequency.

3. Choose from the dropdown how often you wish to receive service bookings and quotations notifications and select **Update**:
   - Immediately
   - Daily
   - Weekly
   - Never
Note: If you choose daily or weekly, all changes for the previous day or week (Monday to Sunday) will be grouped together and sent in one message to your inbox.

4. Select Cancel if you wish to cancel the selection. A popup box will appear asking for confirmation to return to the Profile screen without updating any contact details.

5. Select Yes to return to the Profile screen; select No to return to the list of correspondence options and make a selection.

Organisational staff

Your role (also shown as Responsibility or Contact type depending on the screen) will be allocated to you by your organisation’s Account Manager.

If you are linked to multiple organisations, your role may vary between organisations.

Depending on your role, you can view your profile, edit your details, edit contacts and update bank account details. The roles available are:

<table>
<thead>
<tr>
<th>Contact type responsibility role</th>
<th>Number allowed (per org)</th>
<th>Service bookings</th>
<th>Payment requests</th>
<th>Add/ Remove contacts</th>
<th>Update bank account</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account manager</td>
<td>Multiple</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Primary contact</td>
<td>One</td>
<td>✓</td>
<td>✓</td>
<td>✗</td>
<td>✗</td>
</tr>
</tbody>
</table>
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<table>
<thead>
<tr>
<th>Contact type responsibility role</th>
<th>Number allowed (per org)</th>
<th>Service bookings</th>
<th>Payment requests</th>
<th>Add/Remove contacts</th>
<th>Update bank account</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alternative contact</td>
<td>Unlimited</td>
<td>✓</td>
<td>✓</td>
<td>×</td>
<td>×</td>
</tr>
</tbody>
</table>

If you have the Account Manager role, you can edit the staff roles for your organisation through the Organisational Staff section.

**Important note:** If you change someone to Primary contact, it will end date the current Primary contact (as there can only be one Primary contact). For example, if you create the new Primary contact with a start date 02/12/2016, the current Primary contact will automatically have an end date of 01/12/2016.

**Important note:** The first person who links to an organisation will be automatically assigned the roles Primary contact and Account manager. This applies whether the registration is processed through the NDIA or the Commission.

1. Select **End Role** in the Action column to remove that access type from a contact.
2. To add a new role to an existing contact, select **Add Role**.

3. Select the contact type from the **Contact Type** dropdown and select **Update** to save the record.
Tip: The Contact Type available to select will be limited to the roles the staff member does not hold.

Tip: An individual user cannot hold both Primary contact and Alternate contact roles at the same time.
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Bank details
The NDIA will pay Payment Requests from your organisation to this account

1. To add bank account details, select Add Bank Detail from the Bank Details section.

   **Note**: Only the Account Manager can add or edit bank accounts details.

   **Note**: Bank details cannot be updated if there are payments approved but not yet paid. Changed bank details will take effect immediately.

2. Complete the following fields:
   - At **Account Name**, enter the bank account name.
   - At **BSB**, enter the six-digit BSB number.
   - At **Account Number**, enter the account number.
   - Select **Update**.

3. Once you have saved your bank account details, use the **Edit** button if you need to change the account details.

   **Note**: Whenever the bank account details are added or edited, the primary contact for your organisation will receive an SMS stating:

   *We have updated your bank account details as requested. Contact NDIA on 1800 800 110 if you need to.*
Registration details

This function enables you to view the status of each of the registration groups for which your organisation has requested approval. Each **Registration Group** describes a type of service you provide to participants.

Responsibility for the registration of NDIS providers commenced transition to the NDIS Quality and Safeguards Commission on 1 July 2018. The transition will be in stages as shown below:

- 1 July 2018: NSW and SA
- 1 July 2019: ACT, NT, Qld, Tas, and Vic
- 1 July 2020: WA

From 1 July 2018, you need to maintain your registration details and registration groups through either the NDIA (provider portal), or the NDIS Commission (portal for providers), or both, according to the states and territories to which the registration applies. The NDIA and NDIS portals provide links to each other and will guide you to the correct portal if required.

<table>
<thead>
<tr>
<th>Function</th>
<th>Provider type</th>
<th>NDIA</th>
<th>NDIS Commission</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provider registration</td>
<td>New provider registration</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>NSW/SA</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>New provider registration other states/territories (except NSW/SA)</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Provider registration in NSW/SA and other states/territories</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>Registered providers NSW/SA</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Registered provider other states/territories (except NSW/SA)</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Add / edit registration group</td>
<td>Registered provider NSW/SA and other states/territories</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Add / edit outlets</td>
<td>Other states/territories (except NSW/SA)</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td></td>
<td>NSW/SA and other state/s</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Organisational detail changes:</td>
<td>NSW/SA</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Other states/territories (except NSW/SA)</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td></td>
<td>NSW/SA and other state/s</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Edit bank account details</td>
<td>All providers</td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>

**Note:** You can add new registration groups to be considered for approval by the Agency, as well as request suspension or revocation of an approved registration group, if necessary.
Add new registration group

1. Select the Registration Details tile on the myplace home page.

2. Select Add Registration Group.
3. Select the **Registration Group** from the dropdown list.

4. Select the most appropriate professions from the **Professions** dropdown.

**Note:** Please refer to the [Guide to Suitability for description of professional requirements](#). Selecting ‘Not Stated’ or ‘Other’ may delay processing of the registration.
5. Select the relevant states/territory from the State(s)/Territories dropdown.

Note: If you select a state/territory that has been transitioned to the NDIS Quality and Safeguards Commission, the following screen displays.

6. Select ‘Go to NDIS Commission’ to continue registration in the Commission system or select ‘Continue with NDIA’ to return to the state/territory selection.
7. Nominate your state/territory and select **Submit**.

A message will display stating that the registration details have been successfully submitted.

**Important**: This service can only be delivered after your registration has been approved by the Agency (indicated by a status of **Approved** on the **Registration Details** screen).

**Note**: if you select **Save**, your changes will be saved with a status of **Draft** for you to update and submit later.

**View or edit your registration details**

1. Select the **Registration Details** tile on the **myplace** home page.
2. A list of your registration groups displays. To view the professions for the registration group, select the down arrow to the left of the group. To edit a registration group, select the pencil icon under the Actions heading on that row.

<table>
<thead>
<tr>
<th>Registration Group</th>
<th>Region</th>
<th>Start Date</th>
<th>End Date</th>
<th>Status</th>
<th>Suspension Start Date</th>
<th>Suspension End Date</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodation/Tenancy</td>
<td>National</td>
<td>01/01/2016</td>
<td>31/12/9999</td>
<td>Approved</td>
<td>N/A</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Assist Access/ Maintain Employ</td>
<td>National</td>
<td>01/01/2016</td>
<td>31/12/9999</td>
<td>Approved</td>
<td>N/A</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Assist Prod-Pers Carer/Safety</td>
<td>National</td>
<td>01/01/2016</td>
<td>31/12/9999</td>
<td>Approved</td>
<td>N/A</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Group/Centre Activities</td>
<td>National</td>
<td>01/01/2016</td>
<td>31/12/9999</td>
<td>Approved</td>
<td>N/A</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Custom Prosthetics</td>
<td>National</td>
<td>01/01/2016</td>
<td>31/12/9999</td>
<td>Approved</td>
<td>N/A</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Hearing Services</td>
<td>National</td>
<td>01/01/2016</td>
<td>31/12/9999</td>
<td>Approved</td>
<td>N/A</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Spec Support Employ</td>
<td>National</td>
<td>01/01/2016</td>
<td>31/12/9999</td>
<td>Approved</td>
<td>N/A</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Support Coordination</td>
<td>National</td>
<td>01/01/2016</td>
<td>31/12/9999</td>
<td>Approved</td>
<td>N/A</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Specialised Disability Accommodation</td>
<td>National</td>
<td>01/01/2016</td>
<td>31/12/9999</td>
<td>Approved</td>
<td>N/A</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Assistance Animals</td>
<td>National</td>
<td>01/01/2016</td>
<td>31/12/9999</td>
<td>Approved</td>
<td>N/A</td>
<td>N/A</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** If you select a state/territory that has been transitioned to the NDIS Quality and Safeguards Commission the following screen displays.
3. Select ‘Go to NDIS Commission’ to continue registration in the Commission system or ‘Select another Registration Group’ to return to the Registration group selection.

4. Select the appropriate action:
   - ‘Suspend’ to request temporary suspension; or
   - ‘Revoke’ to request permanent removal of the Registration group.
   **Note:** Please refer to the Guide to Suitability for description of professional requirements. Selecting ‘Not stated’ or ‘Other’ may delay processing of the registration.

5. Select **Submit**; if you want to cancel the action, select **Cancel**.
Outlet management

Outlet Management allows you to view offices associated with your organisation. Details for these offices can then be displayed in the Provider Finder used by participants and other providers.

You can also add or edit outlet information for outlets in states or territories that have not yet been transitioned to the NDIS Quality and Safeguards Commission.

**Note:** you must be an account manager to update or create outlets.

Select the Outlet Management tile on the myplace home page.

The Outlet Management page displays.

<table>
<thead>
<tr>
<th>Outlet Name</th>
<th>Contact Person</th>
<th>Address</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>AAA movers</td>
<td>Graham Barnes</td>
<td>15 TAY ST, WATSON ACT 2602</td>
<td>0433789123</td>
</tr>
</tbody>
</table>

Please select the state or territory in which your outlet is providing services *Please select Add a New Outlet*
Add a new outlet

1. Select a state or territory from the dropdown list and Add a New Outlet.

   ![Provider Portal Screenshot]

   **Note:** If you select a state/territory that has been transitioned to the NDIS Quality and Safeguards Commission you will be redirected to the Commission portal.

   The Add a New Outlet Details page displays.

2. In the Outlet Details section, complete all the required fields (these are marked with an asterisk *). The Outlet Contact Person must be a person with a role in the organisation (see Roles). The Outlet Status can be either Accepting Referrals (if the outlet is able to provide services to additional participants), Temporary Closure (if the outlet is currently not open but will be in the future), or Not Accepting Referrals (if the outlet is operating but unable to accept new participants).

3. Select Yes, at Display in Provider Finder if you want this outlet to be visible to participants and other providers.

4. Select No, if you want to hide your address details in Provider Finder.

5. In the Address Details section, fill out all the required fields (these are marked with an asterisk *).

   **Note:** As you type in address field, a range of valid addresses will be offered for you to select from. Select the correct address to populate the required fields below. If the outlet address is not automatically found, you can enter the details in each of the required fields.
The Outlet Management page displays.

6. In the Service Details section, select the Locations of the Service from the dropdown menu.  
   
   **Note:** The list is limited to states/territories where the organisation is registered to provide services, and that have not yet been transitioned to the NDIS Quality and Safeguards Commission.

7. Select each of the Services Offered by ticking the Registration Group/Profession combinations.

8. In the Operating Hours section, select the days that the outlet is open by ticking the boxes. Also, update the start and end times for each of the selected days.
9. Select **Submit** once you have filled out the required information.
A message displays stating that the outlet has been created successfully.

Edit an Outlet
1. From the Outlet Management page, select the outlet name you want to view and edit.

   **Note:** Outlets for States/Territories that have been transitioned to the NDIS Quality and Safeguards Commission will be listed, but you will not be able to select them.
The **View Outlet Details** page displays.

2. Select **Edit** in the section that you want to modify.

   **Note:** In the Address Details section you can edit an address by selecting the pencil icon 🍒 for that address.
3. After you have edited the section, select **Save**.

A message displays stating that you have updated the outlet successfully.
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Preview the Outlet

1. To ensure the information is displayed in the participant portal as expected, select Provider Finder Preview from the View Outlet Details page. Select Back to return to the previous screen.

   **Note:** The Provider Finder enables participants and providers to search for providers to meet a participant’s support needs. The participant or provider can tailor the search by name, location, category of support.

The Provider Finder view screen, displays.

2. Select Back to return to the previous screen.
3. **Select Edit Outlet Details to make more updates.**

[Image of Provider portal details with options to select Edit Outlet Details]

- Organisation Name: AAA MOVERS
- Outlet Status: Accepting Referrals
- Contact Person: Graham Jones
- Contact Details: 0433789123
- Address: 15 TAY ST, WATSON, ACT, 2602
- Operating Hours:
  - Sunday: Closed
  - Monday: 09:00 - 17:00
  - Tuesday: 09:00 - 17:00
  - Wednesday: 09:00 - 17:00
  - Thursday: 09:00 - 17:00
  - Friday: 09:00 - 17:00
  - Saturday: Closed

[Options to show map or edit outlet details]
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Link to my organisation

This allows you to link your PRODA account to another provider. It works the same way as when you linked the current provider you are using in myplace. For further details on provider registration and linking PRODA with myplace, refer to Modules 2 and 3 of the Provider Toolkit.

1. Select the Link to my Organisation tile on the myplace home page.

2. Enter the ABN (11 digits, no spaces) of the provider to which you wish to link and select Search.

3. Select the provider from the list and select Next.
4. A thank you message displays. Your request is sent through to the provider.

**Important note:** If you are linking to a provider that does not have a primary contact set up, a new screen will pop up that asks you to provide one.