NDIS myplace provider portal

Step-by-step Guide

October 2019
Provider portal - Step-by-step guide

Changes from the last version

The following updates have been made to the last published version of the Provider portal Step-by-step guide:

- Updated to align with changes to the portal to improve how providers, NDIA and participants manage quotes.
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Introduction

The myplace provider portal is a secure website developed for providers to manage their transactions with the NDIA, and view and manage their services with Participants. This step-by-step guide describes how the myplace portal works and provides the general layouts of the menus and screens in the portal. It also includes instructions for using each of the functions in the portal.

What can you do in myplace?

You can use myplace to:

- View your contact details
- View, add and edit NDIS (National Disability Insurance Scheme) registration details, including updates to registration groups and professions\(^1\)
- Link another registered provider organisation (if applicable)
- View messages received from NDIS
- Instant message with your linked participants
- Create and manage service bookings
- Create and view payment requests (previously known as claims)
- View and respond to quotes received from NDIS
- View referrals made to your organisation
- View Support Coordination Requests for Service and action these requests
- Upload required documents
- Download reports about all your service bookings and participants.

Minimum internet browser requirements

To access myplace, there are minimum browser requirements. These are:

- Internet Explorer 9
- Mozilla Firefox 30
- Google Chrome 39
- Safari 5 (Apple only).

Additional reference material

Further information can be found in the Provider Toolkit.

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\(^1\) Add and edit is only available in those jurisdictions that have not yet transitioned to the NDIS Quality and Safeguards Commission. As of 1 July 2018, the non-transitioned jurisdictions are Vic, Qld, ACT, NT, Tas and WA.
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Accessing myplace

1. Access the myplace portal using the link provided on the NDIS website or type https://myplace.ndis.gov.au/supplier in your internet browser.

2. If you already have a Provider Digital Account (PRODA), please enter your PRODA Username and Password then select Login.
3. If you do not have a PRODA (Provider Digital Access) account, please refer to the PRODA - Step-by-step guide found in the Provider Toolkit.

Create a Provider digital account
If you do not have a Provider Digital Account, please refer to the myplace registration for new providers - Step-by-step guide found in the Provider Toolkit.

Select a provider
A list of the organisation(s) you may act for (work on behalf of) is displayed.

1. Select the organisation you wish to use myplace for on this occasion. The system will then display information relating to only that organisation.

Note: The provider number may also be referred to as Business Partner Number (BPN).

Note: You can select a different organisation at any time using the ‘Acting for’ link at the top right of the home page.
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Note: If the organisation you are acting for is not on the list, you can link to it using Link to my Organisation.

The myplace home page displays.
myplace Portal home page
The myplace Portal home page contains a number of separate sections or functions.
The following table provides an explanation of each of the information on the myplace portal home page.

<table>
<thead>
<tr>
<th>myplace section</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Acting for GRAHAM JONES</strong></td>
<td>The provider organisation you are acting for is displayed here. If you work for (and are linked to) more than one provider organisation, you can select which organisation you are using myplace for by selecting the Change Provider icon. Refer to Module 9 (for existing providers) and Module 10 (for new providers) of the Provider Toolkit to link to other provider organisations. If you only work for one provider organisation, you do not need to change any settings here.</td>
</tr>
<tr>
<td><strong>Hello Graham Jones</strong></td>
<td>This is where your username is displayed. You can use the dropdown button to return to the home page or logout of myplace at any time.</td>
</tr>
<tr>
<td><strong>myplace</strong></td>
<td>Select this icon at any time to return to the myplace home page.</td>
</tr>
<tr>
<td><strong>?</strong></td>
<td>Select this icon for simple explanations of the functions displayed on the screen.</td>
</tr>
<tr>
<td><strong>My Participants</strong></td>
<td>View and manage your participants.</td>
</tr>
<tr>
<td><strong>Inbox</strong></td>
<td>View messages and letters sent to you by the NDIA.</td>
</tr>
<tr>
<td><strong>Registration Details</strong></td>
<td>View and edit your registration details, including updates to Registration groups and Professions.</td>
</tr>
</tbody>
</table>
## myplace section | Function
---|---
Outlet Management
Add and view outlet details | View and edit your organisation's outlet details.

Service Booking
Create and manage service bookings | Create and manage service bookings with participants.

Payment Request
Create and manage new and existing payment requests | Create and manage new and existing payment requests.

Quotations
View and respond to quotes sent to your organisation from the NDIA | View and respond to quotes sent to you by the NDIA.

Referrals
View referrals made to your organisation | View referrals made to your organisation.

Messages
Instant message your participants | Send instant messages to your Participants.

Link to my Organisation
Find an organisation using an organisation | Link to your organisation/s, in order to view them through the myplace provider portal.
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<table>
<thead>
<tr>
<th>myplace section</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Upload Evidence</td>
<td>Upload required documents.</td>
</tr>
<tr>
<td>Provider Finder</td>
<td>Search for providers within a certain location.</td>
</tr>
<tr>
<td>View Plan</td>
<td>View plan details when granted consent by a participant.</td>
</tr>
<tr>
<td>NDIS Commission</td>
<td>Navigate to the NDIS Commission portal.</td>
</tr>
<tr>
<td>Profile</td>
<td>View and edit information and contact details for yourself and your organisation.</td>
</tr>
<tr>
<td>Downloads</td>
<td>Request and download service bookings information, quotes, or information for participants that your organisation has active service bookings with.</td>
</tr>
<tr>
<td>Request for Service Forms</td>
<td>View and action Support Coordination Requests for Service Forms.</td>
</tr>
</tbody>
</table>
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Provider portal navigation

Using a function

Select the relevant tile displayed in the myplace home page to go into that section of the provider portal.

**Tip:** From most functions within the portal, the person icon on the top right of the screen will take you directly to your Profile.

You will note that some tiles have a purple banner across the top right-hand corner with a number showing. This indicates the number of items that have not been actioned. For example, the Inbox tile below shows a purple banner with the number ‘6’. This indicates that there are six messages in your Inbox requiring attention.

Returning to the myplace home page

You can return to the myplace home page in any of the following ways:

1. Select the myplace logo (top left corner of the portal page).
2. Select the Home button (top left corner of the portal page) to return to the myplace home page.

Select the Home link in the breadcrumb trail below the myplace logo.
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Help and feedback

Getting help
Select the question mark icon (top right corner of the portal page) for simple explanations of the functions displayed.

Call NDIA on 1800 800 110 if you are unable to resolve a problem or need help to use myplace.

Providing feedback
NDIA welcomes feedback on the portal. A Feedback link has been placed in the page footer on every screen to allow you to provide feedback.

A Feedback Form displays when you select the Feedback link.
The form includes fields for:

- **Description** – Please provide a brief description of the feedback you are providing.

- **Feedback type** – When you have completed your Description, please select from the dropdown list of feedback types. These include:
  - General Feedback
  - Compliment
  - Complaint
  - Appeal: Internal Review
  - Appeal: External Review

- **Primary Category** - When you have selected a feedback type, you should choose from the range of categories in the dropdown list. See screenshot below.

  **Note:** The **Primary Category** allows you to provide feedback on a range of NDIA matters and its various online services and platforms.

- **Feedback Details** – You should write the feedback you want to share with NDIA here.
  **Note:** There is a character limit of 300, so your feedback will need to be succinct.

Once you have completed the **Feedback Form** fields described above, select the **Submit** button to send your feedback to NDIA.
Maintaining your organisation and personal details

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).  
- Manage your Outlets (the times and places from which you deliver services).
- Manage the organisations which Link to my Organisation (the organisations you work for).

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.

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2 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).

3 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
View your profile details below.

<table>
<thead>
<tr>
<th>Section</th>
<th>Open Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>About Me</td>
<td>Open Section</td>
</tr>
<tr>
<td>My Organisation Details</td>
<td>Open Section</td>
</tr>
<tr>
<td>How Frequently Can NDIA Contact Me?</td>
<td>Open Section</td>
</tr>
<tr>
<td>Organisational Staff</td>
<td>Open Section</td>
</tr>
<tr>
<td>Bank Details</td>
<td>Open Section</td>
</tr>
</tbody>
</table>

- [Open all sections](#)
- [Close all sections](#)
About me

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

4. 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

5. 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.

6. 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:
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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>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>X</td>
<td>X</td>
</tr>
<tr>
<td>Alternative contact</td>
<td>Unlimited</td>
<td>✓</td>
<td>✓</td>
<td>X</td>
<td>X</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.
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 NSW/SA</td>
<td></td>
<td>X</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>Add / edit registration group</td>
<td>Registered providers NSW/SA</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Add / edit outlets</td>
<td>Registered provider other states/territories (except NSW/SA)</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Registered provider NSW/SA and other states/territories</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Organisational detail changes:</td>
<td>NSW/SA</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Address</td>
<td>Other states/territories (except NSW/SA)</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Contact details etc</td>
<td>NSW/SA and other state/s</td>
<td></td>
<td></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.

![Registration Group selection](image)

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

![Professions selection](image)

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

![Image of the Provider portal - Step-by-step guide](image)

**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.

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](https://www.ndis.gov.au). Selecting ‘Not stated’ or ‘Other’ may delay processing of the registration.

5. Select **Submit**; if you want to cancel the action, select **Cancel**.
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Edit Registration Group
Edit your existing registration group details below

- Registration Groups: Group/Centre Activities
- State(s)/Territory: Aust Capital Terr
  - Status: Approved
- Start date: 18/10/2017
- End date: 18/10/2030
- Action: *
  - No Action
  - Suspend
  - Revoke

Submit
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.

```
Outlet Management
Add and view outlet details
```

```plaintext
Outlet Name | Contact Person | Address | Phone
------------|----------------|---------|------
AAA movers   | Graham Barrs   | 15 TAY ST, WATSON ACT 2602 | 0433789123
```

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.

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.

![Outlet created successfully](image)

### 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.

![Outlet Management](image)
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.
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.

![View Outlet Details](Image)

The Provider Finder view screen, displays.

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

Inbox

All messages and letters sent to your organisation will appear in the Inbox. When you open the Inbox, you will see all messages, not just those relating to you or your participants. The number next to messages is the number of new (unread) messages received.

1. Select the Inbox tile on the myplace home page.

2. Your Inbox displays messages and letters received from NDIA.
   
   Note: See How Frequently Can NDIA Contact Me? to choose how often you wish to be notified.

3. Select Unread to show only messages that have not been opened.
4. You can limit the list of messages to a particular type. Select the message type from the Filter drop down.

5. When you have processed a message, you can delete it by moving it to Trash. Select the check box to the left of the messages you wish to delete, select the Move to Trash link to delete all the selected messages.

6. Select the blue file type link to open the message. The message will open in a separate window to enable you to continue processing in the portal while the message is open.

Messages
You can have online conversations with your participants through the instant messaging function.

Starting a new instant message
1. Select the Messages tile on the myplace home page.
Provider portal - Step-by-step guide

2. Enter the participant’s **NDIS Number** and **Last Name** then select **Search**.

3. Type your message in the message field which (highlighted by a yellow rectangular box).

4. Select the ✈️ paper aeroplane icon on the right hand side of the message field to send.
Continuing a previous conversation

You can carry on past conversations by searching for the participant or finding the participant under the Conversations with panel.

- To search for the participant, refer to starting a new instant message in Step 2 above.
- If the participant is shown in the Conversations with panel on the right-hand side of the window, simply click on the participant and your conversation will be displayed.
Administering your services

These functions enable you to:

a. Find your active Participants
b. View a Participant’s plan (if you provide services to that participant and have their consent).
c. View and manage your Service Bookings (these record which supports you will provide to participants, the value of the supports, and the period within which they will be provided).
d. View and manage your Payment Requests (how you submit claims for payment for supports delivered).
e. View and respond to Quotations (requests for quotes for supports from the Agency or a participant).
f. View Referrals to your organisation (created by the Agency when a participant would like you to contact them).
g. View and action Support Coordination Requests for Service.
h. Use the Provider Finder (to find additional supports for a participant).
i. Upload Evidence related to the participant or their supports.
j. Download and view reports about all the service bookings you have with active participants and information about participants you have service bookings with, and also your quotation requests.

Finding Participants

All of your active participants will appear in My Participants. When you open My Participants, you can search for a participant and quickly view their plan, view or create service bookings and payment requests.

⚠️ The NDIA requires consent from participants to share their plans with providers. Only participants and their nominees can provide the NDIA with the consent to share their plans with providers. Participants have the choice to either share, or not share their plans with you and can withdraw consent at any time.

1. Select the My Participants tile on the myplace home page.
2. A list of active participants sorted by first name is displayed. From here you can select the links to view their plan, view or create service bookings and payment requests.

![Image of Provider portal - Step-by-step guide]

- [View of](#) Plan
- [View of](#) Service Bookings
- [Create of](#) Payment Requests
3. To search for a participant, type their name or NDIS number in the Find a Participant field and select Search.
Provider portal - Step-by-step guide

4. To view the plan, select the View link and following instructions from Step 8 in the View Plan section below.

View plan

View Plan allows you to view the plans of participants that you have active service bookings with and have given the NDIA consent to share their plan with you.

The NDIA requires consent from participants to share their plans with providers. Only participants and their nominees can provide the NDIA with the consent to share their plans with providers. Participants have the choice to either share, or not share their plans with you and can withdraw consent at any time.

See Download Service Bookings if you want to download and identify any plans that are expiring in 7 days and that include service bookings that qualify for automatic extension. The 28-day plan auto-extension feature will allow you to discuss the range of services participants might need during the 28-day extension period.

Further information on the 28-day plan auto-extension feature and its impact can be found on the Provider Toolkit website.

1. On the home page select View Plan.

A Participant Search screen displays.

2. A dropdown menu displays for the search criteria field. Use the dropdown menu to select the criteria you wish to use. In this example we are searching by the Participant's Name.

3. Enter the participants first and last name in the search criteria field.

4. Select Search.
5. You must enter both the participant’s first and last name to search. When a participant has a common name, it may be easier to search by NDIS Number. You will receive an error message if you don’t enter both names and will be asked to complete the required fields. The names entered must be an exact match for the system to find the participant.

6. You can only view a participant’s plan if you have an active service booking with the participant. If you do not have an active service booking you will receive an error message.

Note: To create the first service booking, you will need to work from the participant’s printed plan, or the information the participant provides to you.

7. You can hover over the ‘?’ icon to obtain help on fields.
After searching for a participant, you will see the View Participant Plan page. Select the required participant to open their plan details.

8. The View Participant's Plan page shows the participant’s details (name, gender, NDIS number, date of birth and interpreter need) as well as three open/close sections displaying the participant’s:

- **Current Plan** – displays the days remaining in the plan. Select the View Previous Plans button to view the details of past plans.
• **Goals** – listing the participant’s goals and their response to ‘How I will achieve this goal’ and ‘How I will be supported’

• **Participant’s Nominee Details** – showing the nominee’s name and relationship details, where a nominee exists.
Provider portal - Step-by-step guide
The **View Participant’s Historical Plan** page opens.

9. Select **Open Section** to view details of past plans.

**Note:** this will only be available if the participant has previous plans.

**Important Note:** Help text is available throughout the screens. Simply hover your cursor over the field you need more information about.
10. When you have been given consent to view a participant's plan and you are a registered plan manager with an active service booking you will see the information outlined at point five as well as information about the budget in a participant’s plan.

11. By selecting **Open Section**, you will see the initial Approved Funds spent and the amount of Funds Remaining. Details of any Funds Allocated will also be shown.
Provider portal - Step-by-step guide

<table>
<thead>
<tr>
<th>Goals</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Plan Budget</td>
<td></td>
</tr>
<tr>
<td>Current at: Thu, Sep 27, 2018</td>
<td></td>
</tr>
<tr>
<td>Approved Funds: $44,750.67</td>
<td></td>
</tr>
<tr>
<td>Funds Spent: $141.00</td>
<td>Funds Remaining: $44,609.67</td>
</tr>
<tr>
<td>Capacity Building</td>
<td></td>
</tr>
<tr>
<td>Approved Funds: $30,993.74</td>
<td></td>
</tr>
<tr>
<td>Funds Spent: $41.00</td>
<td>Funds Remaining: $30,952.74</td>
</tr>
<tr>
<td>Improved life choices</td>
<td></td>
</tr>
<tr>
<td>Funds Spent: $0.00</td>
<td>Funds Remaining: $1,001.00</td>
</tr>
<tr>
<td>Allocated Rem: $1,000.00</td>
<td></td>
</tr>
<tr>
<td>Improved daily living</td>
<td></td>
</tr>
<tr>
<td>Funds Spent: $20.00</td>
<td>Funds Remaining: $1,111.00</td>
</tr>
<tr>
<td>Allocated Rem: $2,000.00</td>
<td></td>
</tr>
<tr>
<td>Finding and keeping a job</td>
<td></td>
</tr>
<tr>
<td>Funds Spent: $0.00</td>
<td>Funds Remaining: $2,000.00</td>
</tr>
<tr>
<td>Allocated Rem: $2,000.00</td>
<td></td>
</tr>
<tr>
<td>Improved health and wellbeing</td>
<td></td>
</tr>
<tr>
<td>Funds Spent: $0.00</td>
<td>Funds Remaining: $2,500.00</td>
</tr>
<tr>
<td>Allocated Rem: $2,500.00</td>
<td></td>
</tr>
<tr>
<td>Improved living arrangements</td>
<td></td>
</tr>
<tr>
<td>Funds Spent: $0.00</td>
<td>Funds Remaining: $2,500.00</td>
</tr>
<tr>
<td>Allocated Rem: $2,500.00</td>
<td></td>
</tr>
<tr>
<td>Improved learning</td>
<td></td>
</tr>
<tr>
<td>Funds Spent: $0.00</td>
<td>Funds Remaining: $25,000.00</td>
</tr>
<tr>
<td>Allocated Rem: $25,000.00</td>
<td></td>
</tr>
<tr>
<td>Improved relationships</td>
<td></td>
</tr>
<tr>
<td>Funds Spent: $0.00</td>
<td>Funds Remaining: $25,000.00</td>
</tr>
<tr>
<td>Allocated Rem: $25,000.00</td>
<td></td>
</tr>
<tr>
<td>Increased social and community participation</td>
<td></td>
</tr>
<tr>
<td>Funds Spent: $1.00</td>
<td>Funds Remaining: $182.74</td>
</tr>
<tr>
<td>Allocated Rem: $182.74</td>
<td></td>
</tr>
</tbody>
</table>

Support coordination

<table>
<thead>
<tr>
<th>Capital</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Core</td>
<td></td>
</tr>
</tbody>
</table>

12. In the Capital section, amounts will only be shown where a quote has been accepted. The amount will be shown as Approved Funds.

Note: When you have been given consent to view a participant’s plan and you are a registered support coordinator with an active service booking you will see the information outlined at points five and nine as well as information about the type of plan management in the plan and details of other community, mainstream and in kind supports.
Consent to view plan notification

1. You will receive via the Inbox, notification of consent to view a participant’s plan, as well as any changes to consent. This will be a message of type ‘Changes to plans shared with you’.

2. See Inbox Step 4 for details of how to filter messages by type.
Provider portal - Step-by-step guide

Service bookings

Prior to providing services to a participant, you need to ensure there is a service agreement (not held in the NDIS system) between you and the participant.

A service booking details support(s) that you will provide to a participant under the service agreement. Both you and the participant will need to agree to the service. A service booking must be in place before you can be paid for a service.

You can create and manage service bookings with your participants using myplace. Service bookings can also be created by participants, their nominee, or their plan manager. A participant may also be supported by an Agency representative to complete their service bookings.

Providers can:

a. Create a new service booking with a participant.

b. View and edit existing service bookings.

c. Accept or reject a new service booking including providing a reason for rejection.

d. Accept or reject a change to an existing service booking, including providing a reason for rejection.

e. Edit support details on a service booking including duration, price and quantity.

f. End a service booking including immediate cancellation.

Important points to note:

- The dates of the service booking must be within the participant’s current plan.

- If the dates of your service booking do not cover the whole plan duration, you can create additional service bookings, or extend it to cover the plan. The dates of the service bookings (with the same support category) cannot overlap. Plan Managers should create their service bookings for the duration of the plan.

- End dates of service bookings that are about to expire, and that share the same end date as the plan they belong to, will be extended using the 28-day plan auto-extension feature. Note that some service booking supports cannot be auto extended. The auto-extension feature, where it has been applied, will allow you to discuss the range of services participants might need during the 28-day extension period. Providers will receive an alert in the service booking screen to notify when a service booking has received an extension.

Further information on the 28-day plan auto-extension feature and its impact can be found on the Provider Toolkit website.

- A service booking must have at least one support category (displayed as Support Budget) included.

- You can have multiple support categories within one service booking.

- You can have additional service bookings for the participant for other support categories.

- The Item Number field (line item) is not mandatory unless the item is stated in the plan.
Create service bookings

Providers can create two types of service bookings depending on the participant's plan. Participant plans will have funding allocated at either a category level or an item level. (Some will have funding at both levels. In this case, providers might need to create two separate service bookings.)

**Item level funding**

If a participant has a stated item in their plan, and the provider tries to create a service booking in the support category but does not choose the support item, the portal will reject the service booking.

The stated support must be chosen to lock in the funds for that support and to create a service booking.

**Category level funding**

If a participant has funding allocated at a category level, the provider can create a service booking without having to state the line item.

This type of service booking allows providers to use participant funds more efficiently and delivers greater flexibility for participants to utilise their funding across different support items within a support category.

*Important: The Agency recommends that service bookings be created at the category level, if possible. This allows providers and participants to negotiate or access supports on a more flexible basis, especially for on-the-spot assessments or services. This is preferable to having to create another service booking for that item at a later date or having funds locked into a support line item that does not relate to the appropriate support.*

1. Select the Service Booking tile on the myplace home page.

The Service Booking page displays.
2. Select the **New Service Bookings** tile.

The **Add** service booking page opens.

3. Enter the participant’s **Last Name**, **NDIS Number**, **Date of Birth** and select **Search**.

The **Service Booking Details** section (Step 1) opens.
4. Select the **Service Booking Type**. The types available are:

   o **Standard booking** is available when funds are Agency managed. In most instances the only option will be standard booking.

   o **Plan managed** is only available when a provider is managing participant funding, as specified in the plan. The plan manager provider must be registered to do this. To create a plan managed service booking, a standard service booking between the plan manager and participant must first exist. This standard service booking needs to include at least one item for financial intermediary supports.

5. Enter the start and end dates of the service booking. These dates cannot sit outside the date range of the plan.

6. Select **Find Plan**.
The Select Plan section (Step 2) opens.

![Select Plan](image1)

7. Select the button of the plan you want to work with.

The Support Details section (Step 3) opens.

![Support Details](image2)

8. Select the support category using the dropdown button for Support Budget.

9. Select the magnifying glass in the Item Number field. If you do not wish to record the Item Number, skip steps 10 and 11.

   **Note:** The Item Number field (line item) is not mandatory unless the item is stated in the plan. Typically, an item is not stated but contact the participant to verify.
The list of support items opens.

10. Select the relevant **Support Item Number**.

   **Note:** Only items which you are registered to provide will be displayed.

11. If the support relates to an in-kind program, select it in the in-kind program section.

12. In the Support details section (Step 3), enter the allocated amount and the quantity as agreed with the participant then select **Add**.

   **Note:** For time-based supports, you can either enter the total amount or the number of hours with an hourly rate. This will not impact payment requests.

   **Note:** For in-kind program supports, the allocated amount is read only.

- Select **Reset** to clear all your entries and selections.
- If you need to add another support item, select **Add**.
13. The support item added moves to the Added Details section.

- If these details are incorrect, you can edit or remove the entry using the Action links.
- When the details are correct, select Next to continue.
14. Once you have selected **Next** to continue, the booking and item details display. To edit the details of the service booking, select **Back**.

15. Check the service booking is correct and when you are confident that everything is correct, add comments to the ‘Comments’ field to explain the booking.
16. Ensure the service booking is as agreed with the participant, then tick the mandatory declaration and selectSubmit.

![Add Service Booking Screen]

**Note:** The service booking is automatically approved for the participant when it is created. The booking confirmation page displays.

17. SelectView Service Bookings to go directly to theView Service Bookings page, which is described in the steps below or selectmyplaclogo to return to the home page.

![Add Service Booking Success Screen]
View service bookings

Service bookings can also be created by participants, their nominee, an Agency representative or their plan manager. All your service bookings can be accessed through View Service Bookings.

1. Select View Service Bookings on the Service Booking page. A list of your service bookings will be displayed. The service bookings are sorted by service booking number, with the most recent booking first.

2. Select a Service Booking Number to view details of that booking.

<table>
<thead>
<tr>
<th>Service Booking Number</th>
<th>Service Booking Type</th>
<th>Participant Name (NDIS Number)</th>
<th>Start Date</th>
<th>End Date</th>
<th>Submitted Date</th>
<th>Service Booking Status</th>
<th>Initiated By</th>
</tr>
</thead>
</table>
Note: Only 10 results are listed on screen together. Use the ‘Next’ and ‘Previous’ buttons at the bottom of the screen to navigate forwards and backwards through lists that have more than 10 entries.

Tip: You may need whenever you make a new selection to re-select Refine Search (besides the Search button) to expand and view the sorting options available on screen.

3. You can search the list of service bookings two ways:
   a. By entering a participant’s name or NDIS number, or service booking number; then click the Search button.
   b. By selecting from the ‘Initiated By’ or ‘Status’ dropdowns; then click the Search button.

   - ‘Initiated By’ allows you to view and sort the service bookings by the party that initiated the booking — by All, Participant, Provider or Staff.

   - ‘Status’ allows you to view and sort the service bookings by:
     - Active / Inactive (these are listed in the results separately)
     - Awaiting Participant Review
     - Awaiting Review
     - Change Awaiting Participant Review
     - Review Change
     - Rejected

   Note: These are explained below.

<table>
<thead>
<tr>
<th>Service Booking Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Active</strong></td>
<td>The service booking has passed validation and been accepted by the participant and provider. It is currently within the dates where service delivery may occur and can have payment requests made against it.</td>
</tr>
<tr>
<td><strong>Inactive</strong></td>
<td>The service booking passed validation and was accepted by both participant and provider, but it has now expired (past the date of service delivery).</td>
</tr>
</tbody>
</table>
### Service Booking Status

<table>
<thead>
<tr>
<th>Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>It can have payment requests made against it if the date of service delivery falls within the original service booking dates.</td>
<td></td>
</tr>
<tr>
<td>Awaiting participant review</td>
<td>The participant needs to review the new service booking. <strong>Please note:</strong> If the participant does not have access to their myplace portal to review the service booking, you should contact the Agency.</td>
</tr>
<tr>
<td>Awaiting review</td>
<td>The provider needs to review the service booking and either accept or reject it (refer to <a href="#">Accept or reject a new service booking for further details</a>).</td>
</tr>
<tr>
<td>Review change</td>
<td>The service booking has been modified by the participant or Agency. You need to accept the change to make the service booking active or reject the change to keep the service booking as it was (refer to <a href="#">Accept or reject a new service booking for further details</a>).</td>
</tr>
<tr>
<td>Rejected</td>
<td>Either the participant or provider did not accept updates to the service booking. No payment requests can be made against it.</td>
</tr>
<tr>
<td>Change awaiting participant review</td>
<td>The participant needs to review the updated service booking. <strong>Please note:</strong> if the participant does not have access to their myplace portal to review the service booking, please contact the Agency.</td>
</tr>
</tbody>
</table>

4. You can then sort the list of **Search Results** by the column titles; just make your selection from the options in the ‘Sort By’ dropdown to view all service bookings by:

- Service Booking Number
- Service Booking Start Date
- Service Booking End Date
- Submitted Date
- Service Booking Status
- Initiated By.
5. Select a **Service Booking Number** to view details of that booking.
The details of the service booking display.

**Note:** End dates of service bookings that are about to expire, and that share the same end date as the plan they belong to, will be extended using the 28-day plan auto-extension feature. You will see an alert in the service booking screen to notify you when a service booking has received an extension: “The end date of this service booking has been extended to align with the participant’s plan dates”.

6. Select **Back** to return to the previous page.
Accept or reject a new service booking

New service bookings will have a status of ‘Awaiting Review’ and will need to be accepted to become active and enable service delivery and payment.

- Select the View Service Bookings tile and expand the Refine Search dropdown.

2. Click on the Status dropdown and select ‘Awaiting Review’; then click the Search button to display new service bookings awaiting review.
Provider portal - Step-by-step guide

- Select a **Service Booking Number** to view details of that booking.
4. Review the service booking. If you decide to accept the service booking, select ‘Accept’ from the Decision dropdown under Record Review Decision and select Submit.
If you decide to reject the service booking, select a **Reason for Rejection** and select **Submit**.
Accept or reject changes to a service booking

Service bookings that have been modified by the participant or Agency will have a status of ‘Review Change’. You can accept the changes to update the service booking or reject the change to keep the service booking as it was previously.

- Select the View Service Bookings tile and expand the Refine Search dropdown.

- Click on the Status dropdown and select ‘Review Change’; then click the Search button to display new service bookings requiring review.
- Select a **Service Booking Number** to view details of that booking. The revised end date, quantity and amount are shown.
Review the changes and decide whether to accept or reject the change.
If you decide to accept the changes to the service booking, select **Accept** and select **Submit**.

![Service Booking Details](image.png)

**Record Review Decision**

Before proceeding with providing a decision please review the Revised Amount, Revised Quantity or the Revised End date columns as displayed above.
If you decide to reject the changes to service booking, select a **Reason for Rejection** and select **Submit**.
If you select **Other** as the reason, you will need to provide a **Rejection Explanation** and select **Submit**.
Service booking changes notification

A daily summary of all changes that have been made during the day is sent automatically to your Inbox overnight to help alert you to changes that require attention. Just filter your Inbox by ‘Changed Service Bookings’ and select your preferred format (HTML or PDF) to read the notification.

The notification summary of all service booking changes for all participants will be displayed:
Provider portal - Step-by-step guide

If not delivered: GPO Box 700 Canberra ACT 2601

Reference: 4050003397

100 Smith Street
WATSON ACT 2602

29 July 2018

Dear

RE: Summary of Service Bookings requiring further action

The following service bookings have been created or amended and require further action by you:

Please use the myplace portal to review and either accept or reject the change. Note that if the end date has been brought forward, an accrual for pending claims may be added and there can be no further updates to the service booking.

If you have any questions, contact the National Disability Insurance Agency on the details provided below.

Yours Sincerely

National Provider Payments Team
National Disability Insurance Agency

How to contact the NDIS
Please remember if you phone us we need to know we are talking to the right person so we will ask for details only you, or a person authorised on your behalf, would know.

- Phone us: call 1800 800 110
- TTY user: call 1800 555 677 and ask for 1800 800 110
- Speak and Listen (speech-to-speech relay) user: call 1800 555 727 and ask for 1800 800 110
- Internet relay user: visit the www.relayservice.gov.au and ask for 1800 800 110
- Email: enquiries@ndis.gov.au
- More information: www.ndis.gov.au
Edit support details on a service booking

You may need to amend some of the details on the service booking, such as quantity or allocated amount.

1. Follow the steps outlined under View Service Bookings above.

2. Ensure that the service booking to be edited has been initiated by the provider.

3. At step 6, select Update Allocation.

4. Enter the new Quantity, Allocated Amount and check the declaration to confirm that the service booking reflects what you have discussed and agreed with the participant.

5. Select Submit.
End a service booking

You might need to end a service booking if you are unable to continue to deliver the service, or the participant asks you to stop delivering the service.

1. Follow the steps outlined under View Service Bookings above.

2. At step 6, select End Service Booking.

The End Service Booking screen displays.

3. Complete the following fields:

   - At Service Booking End Date, enter the end date for the service booking and the reason for the change (e.g. to support participant choice, some provider choice, and some both).

     **Note:** If you want to change a service booking end date to be later than its current end date, the participant is required to accept the change. You must check the ‘declaration’ at the bottom of the screen to indicate that you have discussed the change with the participant and that you are authorised by them to confirm the new end date.

4. At Reason for Ending, select from the dropdown list. Some reasons are there to support participant choice, some provider choice, and some both.

   - Enter the value of services delivered where a payment request has not yet been submitted at Accrual for pending payment requests. This is to ensure sufficient funds are retained against the service booking to pay for all services delivered.

   - Tick the box at the Declaration. This is a compulsory field and the onus is on you, as the provider, to have discussed and gained consent from the participant to end the service booking.

4. Select Submit.
A warning will be displayed that following the update, Quantity, Allocated Amount (Unit Price) and End Date cannot be changed.

5. Select Yes.
Delete a service booking
If you have created a service booking in error, you may wish to delete it. Service bookings can be deleted only if:

- There is no payment requested created or saved against it
- There is no accrual against it, and
- No payments made.

1. Find the service booking to delete and select the Delete button.

2. A warning will be displayed to confirm that once you delete it, the service booking will be removed from your list of services bookings permanently and you will not be able to provide services or request payment if you proceed.

3. Select Yes.
An information message confirms that the service booking has been deleted.
Payment request

Payment requests were previously known as claims. In this tile you can create and submit payment requests to NDIS. You can also go here to view a history of submitted payment requests.

⚠️ You will need to have provided your bank account details to NDIS before a payment request can be created. Usually, you would have recorded your bank account details in the myplace portal after registering with NDIS (please see Bank Account Details section).

Create a payment request

1. Select the Payment Request tile on the myplace home page.

2. Select Create Payment Request.

3. Search for the participant you have provided services for. You can search for the participant by their first or last Name or NDIS Reference Number. Choose how you want to search by selecting the dropdown menu.
4. Enter the details of the participant for whom you need to submit a payment request and select **Search**. In this example, the participant’s NDIS reference number is selected as the search criteria. The NDIS number can be either the participant’s new NDIS number or the old Siebel NDIS number.
The **Search Results** display.

5. Select the relevant **Participant Name**.

The **New Payment Request** window opens.

6. Enter data in the required fields. These fields are marked with a red asterisk (*) and must be completed. The required fields are **Support Start Date**, **Support End Date**, **Support Category**, **Item Number**, **Item Quantity**, **Payment Amount**, **Claim Type** and **Invoice Number**. If the **Claim Type** is cancellation, a cancellation reason is required.
Provider portal - Step-by-step guide

Note: The information entered for the payment request must align with the service booking (i.e. you cannot enter a date that is outside the date range of the service booking).

7. Select the Support Category.

8. Select the Item Number magnifying glass icon to search for the Item Number.
A list of the items displays that are available to claim.

9. Select the ‘Support item number’ for the item you wish to submit a payment request for.

10. You will also need to enter your Invoice Number as a reference for your payment request. This invoice number is specific to your invoicing process and is not generated by NDIA.

**Important**: The Payment Amount is the total amount being requested; it is not the unit price amount.

11. You will also be required to enter the Claim Type. This field has a dropdown menu that is used to claim for the following services; refer to the NDIS Price Guide for further information on each Claim Type.
12. If the **Claim Type** selected is cancellation, then a **Cancellation Reason** will be required from a list for the most appropriate reason.

<table>
<thead>
<tr>
<th>Cancellation Charges</th>
</tr>
</thead>
<tbody>
<tr>
<td>No show due to family issues</td>
</tr>
<tr>
<td>No show due to health reason</td>
</tr>
<tr>
<td>Other</td>
</tr>
<tr>
<td>No show due to unavailability of transport</td>
</tr>
</tbody>
</table>
13. If you need to add more items for this participant, select Add to enter them. Select Next to continue to the next stage.

**Note:** To delete a line in a payment request, select Delete. The Review Payment Request page opens.

14. Review the following details and select the relevant action:

- If the payment request details are correct, tick the mandatory price guide acknowledgements box at the bottom of the screen and select Submit.
- If the payment request details are correct, select Submit.
Provider portal - Step-by-step guide

- If you need to change any of the payment request details, select Back.
- If you do not wish to continue with this payment request, select Cancel.

You will receive a confirmation once your payment request has been submitted.
View payment request

You can view a history of submitted payment requests. You can view by submitted payment requests or bulk upload files.

Submitted payment requests

1. Select View Payment Request on the Payment Request page.

2. At View By, select Submitted Payments Request from the dropdown list.
3. Select the **Search by** drop down and select the desired search criterion.

4. Enter your search criterion and select **Add to Criteria**. You can add multiple search criteria.
5. You can search by various criteria — rejected, incomplete, pending payment, paid, cancelled or awaiting approval. Select Add to Criteria to add more criteria to your search.

6. Once you have entered all your criteria, select Search.

Your search results display.

7. Select the Payment Request Number to open details of that payment request.
The table below explains what the different status criteria mean.

<table>
<thead>
<tr>
<th>Payment Request Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paid</td>
<td>Payment has been approved and payment issued.</td>
</tr>
<tr>
<td>Incomplete</td>
<td>The payment request needs to be updated as it is incomplete.</td>
</tr>
<tr>
<td>Pending Payment</td>
<td>Payment is yet to be finalised.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>The request has been cancelled.</td>
</tr>
<tr>
<td>Deleted</td>
<td>The request has been deleted.</td>
</tr>
<tr>
<td>Awaiting Approval</td>
<td>Approval required from the Agency.</td>
</tr>
<tr>
<td>Rejected</td>
<td>The payment was not processed and will not be visible to the user.</td>
</tr>
</tbody>
</table>
8. When the details of the payment request display, select **Back** to return to the previous page.

### Payment Request Details

**Payment Request Summary**

<table>
<thead>
<tr>
<th>Bulk File Reference: -</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Participant Name (NDIS Number)</td>
<td>Payment Request Number</td>
</tr>
<tr>
<td>ashwin first (430214424)</td>
<td>10125327</td>
</tr>
</tbody>
</table>

#### Support Details

- **Start Date:** 28/09/2018
- **End Date:** 28/09/2018
- **Category:** Consumables
- **Item Number:** 03_050903053_0103_1_1
- **Item Description:** Incontinence Alarms
- **Claim Type:** Standard
- **Cancellation Reason:**
- **Submitted Amount:** 50.00
- **Quantity:** 1.00
- **GST:** GST Free

#### Other Details

- **Plan ID:** 1022085
- **Service Booking Number:** 50015922
- **In-Kind Program:**
- **Submitted on:** 28/09/2018
- **Submitted By:** GRAHAM BARRS
- **Reject Reason:**
- **Paid On:**

---

**Uploaded bulk payment files**

Further details on how to do this can be found in the Bulk payment request instructions - step-by-step guide in the [Provider Toolkit](https://www.ndis.gov.au).
Cancel payment request

If you make a mistake with a payment request, you can cancel the request if it has a status of *Pending payment* or *Paid*. After the request is cancelled, you can enter a correct payment request if needed.

If you cancel a payment request with a status of **Pending payment** (i.e. we have not yet paid you that amount) the payment request will not be processed.

If you cancel a payment request with a status of **Paid** (i.e. we have paid you that amount and you consider it to have been paid incorrectly), we may:

- send you an invoice requesting repayment of the cancelled amount, or
- offset your future payment requests against the cancelled amount.

**Note:** If we apply an offset, you will not receive any further payments until you have submitted payment requests which in total, equal the cancelled amount.

**Note:** If you wish to return a payment that you have received after cancelling the payment request, please contact us on 1800 800 110.

1. Select the **Payment Request Number** link to display the **Payment Request Details**.

**Note:** Only payments that have the status of **Paid** or **Pending Payment** can be cancelled.
2. Select **Cancel Payment**.

A message displays asking ‘Are you sure you would like to cancel the selected payment?’

3. Select **Yes**.
4. The following message displays. If you search again for the payment request you will see it now has a status of **Cancelled**.

![Message for cancelling payment]

**Recipient Created Tax Invoices (RCTI)**
These are generated for each payment request or bulk upload. To make reconciliation simpler, all invoices for the same day are batched together.

Additionally, there is an ability to download RCTIs in PDF and Excel format.
**Provider portal - Step-by-step guide**

**Bulk payment request upload**
You can upload payment requests in bulk. The payment requests can be uploaded in either .csv or .xml file formats. Use the current version of the bulk upload template available on the myplace portal.

Further details on how to do this can be found in the Bulk payment request instructions - step-by-step guide in the Provider Toolkit.

**Payment summary**
You can view a summary of the payment requests through Payment Summary. The summary can be up to a 30 day period and includes cleared (received) payments, pending payments, rejected payments and bulk upload file payments.

Select Payment Summary on the Payment Request page.

---

1. Enter the From Date and To Date of the summary (up to a 30 day period).

   **Note:** This is the date that the payment was requested.
2. Select Find Summary.
3. Select Open Section to view the summary details.
## Payment Summary

Below is your account summary:

<table>
<thead>
<tr>
<th>Pending Payment Requests</th>
<th>Open Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pending Total: $150.00</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Advance Summary</th>
<th>Open Section</th>
</tr>
</thead>
</table>

## Payment Summary Search

Search for previous payments by entering dates below for up to a 30 day period.

Required fields are marked with an asterisk (*).

<table>
<thead>
<tr>
<th>From Date:</th>
<th>To Date:</th>
</tr>
</thead>
<tbody>
<tr>
<td>27/09/2018</td>
<td>28/09/2018</td>
</tr>
</tbody>
</table>

## Paid Payment Requests

<table>
<thead>
<tr>
<th>Paid Total: $150.00</th>
<th>Open Section</th>
</tr>
</thead>
</table>

## Rejected Payment Requests

<table>
<thead>
<tr>
<th>Rejected Count: 0</th>
<th>Open Section</th>
</tr>
</thead>
</table>

## Incorrect Bulk File Records

<table>
<thead>
<tr>
<th>Incorrect Count: 0</th>
<th>Open Section</th>
</tr>
</thead>
</table>
## Payment Summary
Below is your account summary

<table>
<thead>
<tr>
<th>Date</th>
<th>Payment Request Number</th>
<th>Participant Name</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>29/09/2018</td>
<td>10125330</td>
<td>Ashwin First</td>
<td>NDIS Payment</td>
<td>$100.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>4302144224</td>
<td></td>
</tr>
<tr>
<td>28/09/2018</td>
<td>10125327</td>
<td>Ashwin First</td>
<td>NDIS Payment</td>
<td>$50.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>4302144224</td>
<td></td>
</tr>
<tr>
<td>04/05/2018</td>
<td>10092831</td>
<td>Tom Smith</td>
<td>NDIS Inkind Invoice</td>
<td>$250.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>430210496</td>
<td></td>
</tr>
<tr>
<td>04/05/2018</td>
<td>300000037319</td>
<td>Tom Smith</td>
<td>NDIS Inkind Invoice</td>
<td>-$250.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>430210496</td>
<td></td>
</tr>
</tbody>
</table>
Provider portal - Step-by-step guide

Quotations
This section allows you to view and respond to quotation requests sent to your organisation by the NDIA. Quotations enable you to submit quotes to provide particular supports on a participant’s plan.

Note: Many quotations are currently being managed outside the portal and entered into the system by the Agency to manage system limitations.

This section allows you to view, respond to and manage quotes.

View a quote

1. Select the Quotations tile on the myplace home page.

   When a Quotation Request is received a banner notification will appear on the tile.

The Quotations page opens and your quotes will be displayed. The results will be organised under the following column headers:

- **Find a participant**: Enter either the participant name or their NDIS number.
- **Sort by**: Select an option from the dropdown list to sort the list by the column headers.
- **Quote ID**: The list of quotations requested by NDIA.
- **Participant name (NDIS number)**: The name and NDIS number of the participant that the quotation relates to.
- **Date requested**: The date the quotation was requested by NDIA.
- **Quote type**: Shows the type of quotation.
- **Description**: Describes the item.
- **Item**: Shows the item number.
- **Status**: Shows the status of the quotation as one of the following:
  - Awaiting provider response
  - NDIA has received response
  - Quote has expired
  - Archived
  - Quote is accepted
  - Quote was unsuccessful
  - Quotation open
2. Select **Sort by** to sort the list of quotes by any of these columns. Only one column can be sorted at a time. Use the previous / next page controls at the bottom of the page to move through the list. To return to the previous page, select **Back**.

3. To refine your search, select the **Refine Search** dropdown to display the filters you wish to search on — Quote ID, Quote type, Date requested, Status. You can enter multiple criteria to further refine the list.
4. To view details for a particular quote, select the quote number under the Quote ID column.

The Quotation Details screen displays. It allows you to enter your quotation response and upload any documents directly to the quote request.

5. Select the View quotations button to return to the list of quotations.

Note: For plans migrated from the NDIS trial only, there has been a temporary change to the myplace provider portal to bypass the quotation process. This has been implemented to allow payment requests to successfully be processed.
Respond to a quote

1. To respond to a quotation request, complete the fields in the Quotation response tab:
   - **Supply details**: Enter all relevant information about the supply of the item or service.
   - **Specifications**: Record the conditions of the quote.
   - **Inclusions**: Enter all items that are included in the quote.
   - **Specific exclusions**: Record any items that are excluded in the quote.
   - **Price per unit**: Enter the total price of the quote per unit (excluding GST).
   - **Quantity**: Specifies the item quantity.
   - **GST per unit**: Record the GST amount.
   - **Terms of quote**: Select the number of days that the quote is valid for — either 30 days or 60 days.
2. Once you have entered all the information in the **Quotation response** tab, select the **Associated documents** tab to upload any documents relevant to your response.

The **Associated documents** tab displays. It lists any documents you have previously associated with your response to this quotation. If you have not previously uploaded any documents, the message will display ‘You do not have any associated documents for this quotation’.

If you have previously uploaded a document, you will see it listed.

Select the **Document name** if you want to download and view the document. You will be taken through a set of document download instructions.

Select ‘Remove’ under **Actions** if you want to remove the document from your list of documents. You will be shown a message asking you to confirm your intention to remove the document from your list — either ‘Yes’ or ‘No’.
3. To upload a document, select the **Upload document** button. A **Document Upload** window displays.

A list of ‘Available documents’ is shown at the bottom of the window. These are documents that have previously been linked to this quote.

![Available Documents](image1)

**Note**: Uploaded documents are labelled ‘Available documents’ when you are viewing the **Document upload** form. The same documents are labelled ‘Associated documents’ when you view them on other Quotations screens.

4. Provide a **Document name** and **Description**.

**Note**: Use a meaningful short title for the document name, and a description that will help you distinguish this document from other documents in the list.

![Document Upload](image2)

5. Select **Browse** to locate the file you want to upload. The maximum file size you can upload is 47MB. Then select the **Upload** button.

**Note**: Any documents that you upload will also be visible to NDIA and participants.
A success message displays at the top of the page.

You will see that your file has been added to the **Available documents** list shown below the message.

6. Select the **Back to quotation details** button to return to your response window.
Your quotations details screen displays.

7. Select the **Review** button to review the details of your response before you submit them to NDIA.

8. Once you are satisfied that you have provided all necessary information and uploaded and/or removed relevant documents, select the **Submit** button.
A message displays asking you to confirm your submission of the quotation — either ‘Yes’ or ‘No’.

You are about to submit this quotation. Are you sure?
A success message displays at the top of your quotation details window.

![Success message](https://www.ndis.gov.au)

The status of the quote changes for the quotation details to **NDIA has received response**.

<table>
<thead>
<tr>
<th>Quotation Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>View and respond to quotation request</td>
</tr>
</tbody>
</table>

- **Quote ID**: 5002977
- **Participant NDIS number**: 430219240
- **Participant name**: Deb Quoteman6
- **Date requested**: 25/09/2019
- **Status**: NDIA has received response
- **Item**: 01_040_0115_1_1
- **Item description**: Supported Independent Living - For 3 - L
- **Quantity**: 2.00
- **Quote type**: Assistive - New
- **Reply by date**: 22/05/2019

If the NDIA approves your quote, a service booking is automatically created for you and the participant. You will also receive a message in your **Inbox** informing you that the service booking has been created. The status of the quote changes to **Quote is accepted**.

You will receive a message in your **Inbox** if the quote has been rejected by the NDIA.

**Note**: The system does not enable you to update and resubmit a revised quote. Where negotiation is required, please contact your local NDIA office prior to submitting your quote.
Referrals

This section allows you to view referrals made to your provider organisation by the Agency.

1. Select the Referrals tile on the myplace home page.

2. The list of referrals opens.

3. Select Home to go back to the myplace home page.

Requests for Service

This section allows you to:

- view Support Coordination Requests for Service sent to your provider organisation by the Agency
- access and review Support Coordination Requests for Service sent to your provider organisation by the Agency
- accept or reject Support Coordination Requests for Service sent to your provider organisation by the Agency.
View Support Coordination Requests for Service

1. Select the Request for Service Forms tile on the myplace home page.

2. The full list of Request for Service Forms displays. It shows the complete list of requests for service issued to your organisation.

3. You can search for specific requests for service by participant name or NDIS number.
4. Select an option from the **Refine Search** dropdown to sort the list by the column headers:

- **Request ID**: Individual Request ID for each request.
- **Participant name**: NDIS participant name.
- **Plan End Date**: Participant Plan End Date.
- **Date Requested**: The date the request for service was referred to your provider organisation.
- **Due Date**: The Due Date by which you need to respond to a Request for Service referral request.
- **Status**: Displays the status of the support coordination request for services:
  - Pending, awaiting your review and response (maximum of 4 days)
  - Accepted, provider has accepted the request
  - Rejected, provider has rejected the request
  - Expired, request has not been action by provider before due date
  - Cancelled, the request has been cancelled
5. You can also sort the results in the Sort By dropdown by Request ID and Status.

**Access and review Support Coordination Requests for Service**

1. To access and review a request for service, click on the specific Request ID. You can only access a request for service with a status of Pending or Accepted.

While the list will display all requests for service submitted to your provider organisation, you will not be able to access requests with a status of Cancelled, Rejected or Expired.

2. Select the underlined Request ID.

The Request for Service — Manage New Request for Service screen displays.
The screen shows the following information:

- **Participants Details**: the request ID, participant’s name, participant’s age, the NDIS plan end date, preferred contact method, phone number, email, address, if a participant requires an interpreter, the myplace activation code status, the due date for actioning the request, and why the Agency referred the support coordination request to your provider organisation.

- **Request Details**: the Request ID, document name, and date of attached. This section provide access to the individual request for service details.

- **Referral Decision**: This section allows you to respond to the Agency’s request for support coordination.

3. To access the detail for an individual Request for Service, select the **Request for Services form** link under the ‘Document Name’ column header.
The request for service form displays. It comprises eight ‘parts’ — these are described below. Select the part name you are interested in. You can also select the Next or Back buttons below the part details to move from one part to another.

**Note:** Select the View RFS List button to display the full list of support coordination requests for service issued to your provider organisation.
The eight parts are as follows:

**Part 1&2** displays the participant’s name, age, contact details and other information.

**Part 3&4** displays the details of the request support coordination provider and the nature of the support coordination request.

**Part 5** displays the referrals for assessment that are part of helping the participant to implement their plan.

**Part 6** displays details for the participant such as disability information, living arrangements, relationships and supports.

**Part 7** displays the participant’s goals.

**Part 8** displays the participant’s funded supports included in the participant’s plan.

**Accept or reject Support Coordination Requests for Service**

The **Referral Decision** can be either ‘Accept’ or ‘Reject’.

1. To accept or reject a Request for Service Form, select the underlined **Request ID**.

   | #43743 | Sem Sel | 26/03/2020 | 11/07/2019 | 17/07/2019 | Pending |

2. To accept the referral request, select **Accept** from the Action dropdown box and select the **Submit** button.
3. To reject the referral request, select **Reject**, followed by one of the four **Reject Reasons** in the dropdown box, and then select the **Submit** button.
## Provider portal - Step-by-step guide

![Image of the provider portal - Step-by-step guide]

### Request for Service Details

**Provider portal - Step-by-step guide**

**Participant Details**

- **Request ID:** 643143
- **Name:** Sam Self
- **Age:** 39
- **Plan end date:** 26/03/2020
- **Preferred contact method:** E-Mail
- **Phone:** N/A
- **Email:** shyam.manthevia@ndis.gov.au
- **Address:** 114 BENNETTS RD CORPS HARBOUR NSW 2450
- **Interpreter required:** No
- **myplace activation code:** Not generated
- **Due date:** 17/07/2019
- **Purpose of referral:** n/a

### Request Details

<table>
<thead>
<tr>
<th>Request ID</th>
<th>Document Name</th>
<th>Attached On</th>
</tr>
</thead>
<tbody>
<tr>
<td>643143</td>
<td>Request for service form</td>
<td>11/07/2019</td>
</tr>
</tbody>
</table>

### Referral Decision

- **Action:** Reject
- **Reject Reason:**
  - Please select:
    - No capacity to accept referral
    - No capability to accept referral
    - Insufficient participant budget to accept referral
    - Other

[Submit button]

**Back**
Provider portal - Step-by-step guide

Provider Finder

You may need to assist participants to find supports that you can’t provide. You can use the Provider Finder to search for providers within a specific area. You can also search by a Service (also known as Professions in Registration Groups).

1. Select the Provider Finder tile on the myplace home page.

The Provider Finder page displays.

2. You can search by different criteria; complete the fields that you wish to search by:

   - At **Name**, if you know the organisation, enter the organisation name (or part of the name) you are searching for, otherwise leave blank.
   - At **Category**, select the profession (e.g. Builder) or **Registration Group** (e.g. Home modification) for the provider from the dropdown list, otherwise leave as ‘Any’.
   - At **Near Location**, your organisation address displays. Enter a different address if you want to locate providers in a different area (e.g. use the participant's address if you need a provider close to the participant’s home).
     **Tip:** Start entering the address using street number and name, select from the valid addresses that are listed. The more detail you enter, the more refined the list.
   - At **Within**, select the radius of the search. This radius is based on the address in **Near Location**.

3. Select **Search**.

The results of the search display.

4. Use the pagination functions to move through the results.
Provider portal - Step-by-step guide
Provider portal - Step-by-step guide

5. Select **View Details** to see more information about the provider.

Details of the provider display, including contact information, operating hours, services provided and contact information.

6. Select **Show Map** to view the location of the provider. Or select ‘Back to search results’ to return to the search results.
7. Select **Hide Map** to return to the **Provider Details** page. Or select ‘Back to search results’ to return to the search results.
Upload evidence

For some processes (e.g. Quotations, NDIA Registrations) you need to provide additional information to the Agency. Upload Evidence provides this capability. This area enables you to upload documents to the NDIA.

**Important Note:** Do not use this function to upload evidence related to registration in states/territories that have transitioned to the NDIS Quality and Safeguards Commission. You must upload Commission evidence using the Commission portal.

1. Select the **Upload Evidence** tile on the myplace home page.

2. The **Document Upload** page displays.

3. Type in the **Document Name** (a meaningful name for you) and **Description** (what it contains).

4. Select **Browse** to locate the document on your computer.

5. Select the **Upload** button.

**Note:** Your uploaded documents will display under the **Available Documents** heading.
Note: You are not able to associate the document with an individual participant. If the document needs to be associated with the participant, please contact us on 1800 800 110.

Note: You are not able to open the document from within the portal, or remove it from the system after it is uploaded. If you uploaded the wrong document, please contact us on 1800 800 110.

Tip: Use meaningful document names and description. For example, put the type of document (e.g. Home Modification Plan) in the Document Name, and the Participant’s NDIS number in the Description.

Tip: Ensure you retain a copy of the uploaded file and are able to relate your copy to the Document Name and Description.
Provider portal - Step-by-step guide

Downloads

You can download in just one report information about all the service bookings you have with active participants as well as information about all the participants that you have service bookings with and who have given the NDIA consent to share their plan with you. You can also download a list of your quotation requests.

1. Select the Downloads tile on the myplace home page.

2. After you click the Downloads tile, you will see a new tile screen with three options:
   - Download Service Bookings
   - Download Quotations
   - Download My Participants.

Download Service Bookings

This tile allows you download reports listing all the active service bookings you have with participants.
1. Select **Download Service Bookings** to request and download a report containing your service bookings information.

The **Download Service Bookings** screen displays, listing all service bookings that were active for your organisation in the 90 days to today’s date.

**Note:** If you are downloading reports to identify any service bookings that have expired or are about to expire, to determine if they have been extended by the 28-day plan auto-extension feature, you should filter the report by plan end date in Excel.

<table>
<thead>
<tr>
<th>Requested On</th>
<th>Start Date</th>
<th>End Date</th>
<th>Generated On</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>25/04/2018 09:10</td>
<td>05/01/2018</td>
<td>06/04/2018</td>
<td>24/04/2018 12:35</td>
<td>Download</td>
</tr>
<tr>
<td>25/04/2018 09:10</td>
<td>05/01/2018</td>
<td>06/04/2018</td>
<td>24/04/2018 12:35</td>
<td>Download</td>
</tr>
<tr>
<td>23/04/2018 09:10</td>
<td>05/01/2018</td>
<td>06/04/2018</td>
<td>24/04/2018 12:35</td>
<td>Download</td>
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<tr>
<td>23/04/2018 09:10</td>
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</tbody>
</table>

2. Select **Request Download**. Or select **Back** to go back to the **Downloads** page.

**Note:** You can also download one of the reports already listed.
The Download Service Bookings screen displays with a green tick and system message saying ‘The request for download has been submitted.’ You can select Cancel Request to cancel a download (pending report) that you have just requested. Or select Back to go back to the Downloads page.

3. You will need to refresh the list of reports to view and download the report you have just requested. To do this, select Back to go back to the Downloads page.

The Downloads page displays once more.

4. Select the Download Service Bookings tile to view the list of available reports. Your report will be listed first.

   Note: The system might occasionally experience delays of up to several hours when generating reports depending on the size of the report and system load at the time of request. In this case, you might need to repeat Steps 3 and 4 to see your report.

5. Select Download to download the report you requested.
6. When you select Download, an Acknowledgement window will pop up. Check the box to show you agree and will adhere to the acknowledgement regarding use of the information in the report that you are about to download.
After you check the **Acknowledgement** box, the popup window will expand to display a number of file format download options.

You have a choice of 4 format types depending on your business needs. They are:

- **Print Friendly** — a format that allows you to view the data as a printable, readable report. If you wish to, you can use this format to output a PDF version; you will need to select to ‘print to PDF’ if this function is supported by your computer
- **CSV (Comma Separated Values)** — typically used to open as a spreadsheet for sorting and filtering the data. Note that this download has two heading rows
- **XML (eXtensible Mark-up Language)** — a format for importing into business systems
- **JSON (JavaScript Object Notation)** — a simple format for importing into business applications
Provider portal - Step-by-step guide

Download Quotations
This tile lets you download a list of all your quote requests.

- Select **Download Quotations** to request and download your quote requests.

The **Download Quotations** screen displays a list of all quotes received by your organisation in the previous 90 days. If none were requested, no list will be displayed.

2. Select **Request Download**. Or select **Back** to go back to the **Downloads** page.
   
   **Note:** You can also download one of the reports already listed.

3. When you select **Request Download**, an **Acknowledgement** window will pop up. Check the box to show you agree and will adhere to the acknowledgement regarding use of the information in the report that you are about to download.
4. After you check the **Acknowledgement** box, the popup window will expand to display a number of file format download options.

You have a choice of 4 format types depending on your business needs. They are:

- **Printer Friendly** — a format that allows you to view the data as a printable, readable report. If you wish to, you can use this format to output a PDF version; you will need to select to ‘print to PDF’ if this function is supported by your computer.
Provider portal - Step-by-step guide

- CSV (Comma Separated Values) — typically used to open as a spreadsheet for sorting and filtering the data. Note that this download has two heading rows
- XML (eXtensible Mark-up Language) — a format for importing into business systems
- JSON (JavaScript Object Notation) — a simple format for importing into business applications

Download My Participants

This tile lets you download a list of participants that you have active service bookings with. The download expires 24 hours after the report is requested to ensure the data is always up to date.

Important note: You will only be able to access information for participants who have given your organisation their consent to access their information. The information will in turn be restricted to:

- Participant name
- NDIS number
- Plan number
- Plan start date
- Plan end date
- Gender
- Interpreter required.

Select Download My Participants to request and download your participants information.

The Download My Participants screen displays listing any reports requested by your organisation in the previous 24 hours. If none were requested, no list will be displayed.
• Select Request Download. Or select Back to go back to the Downloads page.

**Note:** You can also download one of the reports already listed.

The **Download My Participants** screen displays with a green tick and system message saying ‘The request for download has been submitted.’ You can select Cancel Request to cancel a download (pending report) that you have just requested.

Or select Back to go back to the Downloads page.

3. You will need to refresh the list of reports to view and download the report you have just requested. To do this, select Back to go back to the Downloads page.

The Downloads page displays once more.
4. Select the Download Service Bookings tile to view the list of available reports. Your report will be listed first.

**Note:** The system might occasionally experience delays of up to several hours when generating reports depending on the size of the report and system load at the time of request. In this case, you might need to repeat Steps 3 and 4 to see your report.

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