

NDIS myplace provider portal

Step-by-step Guide

November 2018

Changes from the last version

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

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

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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 professions¹
- 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
- Upload required documents
- Download reports about all your service bookings and participants.

Minimum internet browser requirements to access myplace

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](#).

¹ Add and edit is only available in those jurisdictions that have not yet transitioned to the NDIS Quality and Safeguards Commission.

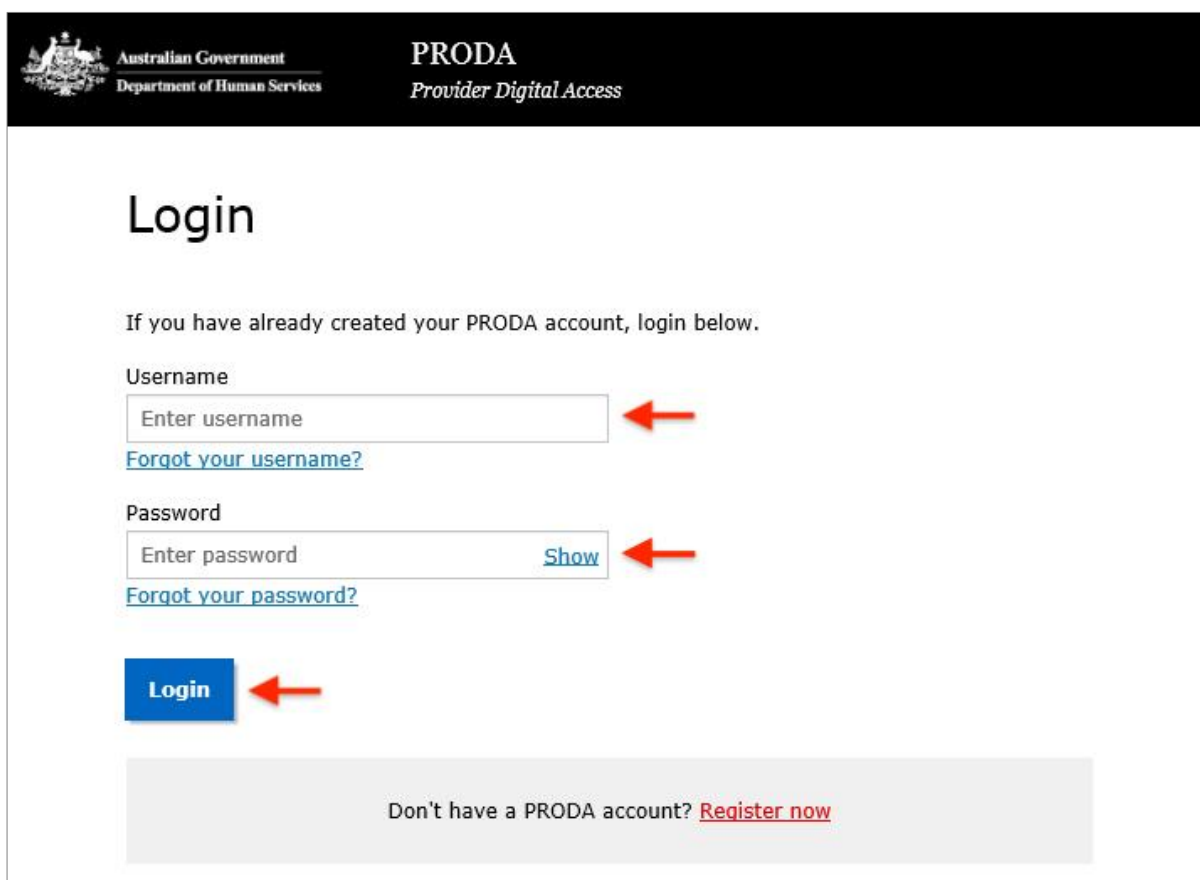
As of 1 July 2018, the non-transitioned jurisdictions are Vic, Qld, ACT, NT, Tas and WA.

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**.



Australian Government
Department of Human Services

PRODA
Provider Digital Access

Login

If you have already created your PRODA account, login below.

Username

[Forgot your username?](#)

Password

 [Show](#)

[Forgot your password?](#)

Login

Don't have a PRODA account? [Register now](#)

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.

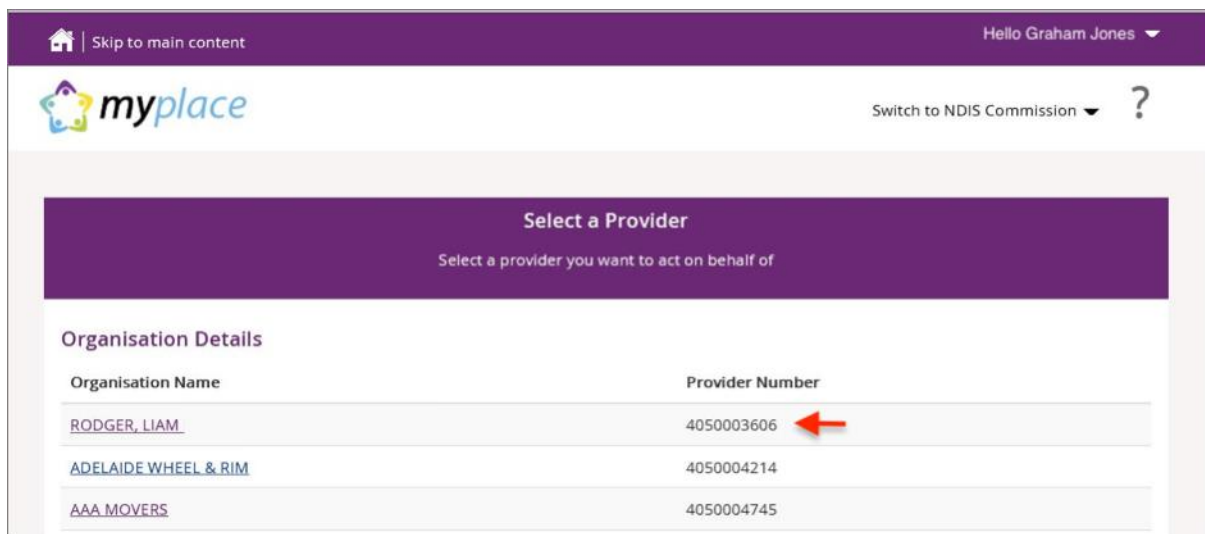
Note: The provider number may also be referred to as Business Partner Number (BPN).

Note: You can select a different organisation at any time using the '**Acting for**' link



at the top right of the home page.

Note: If the organisation you are acting for is not on the list, you can link to it using **Link to my Organisation**.



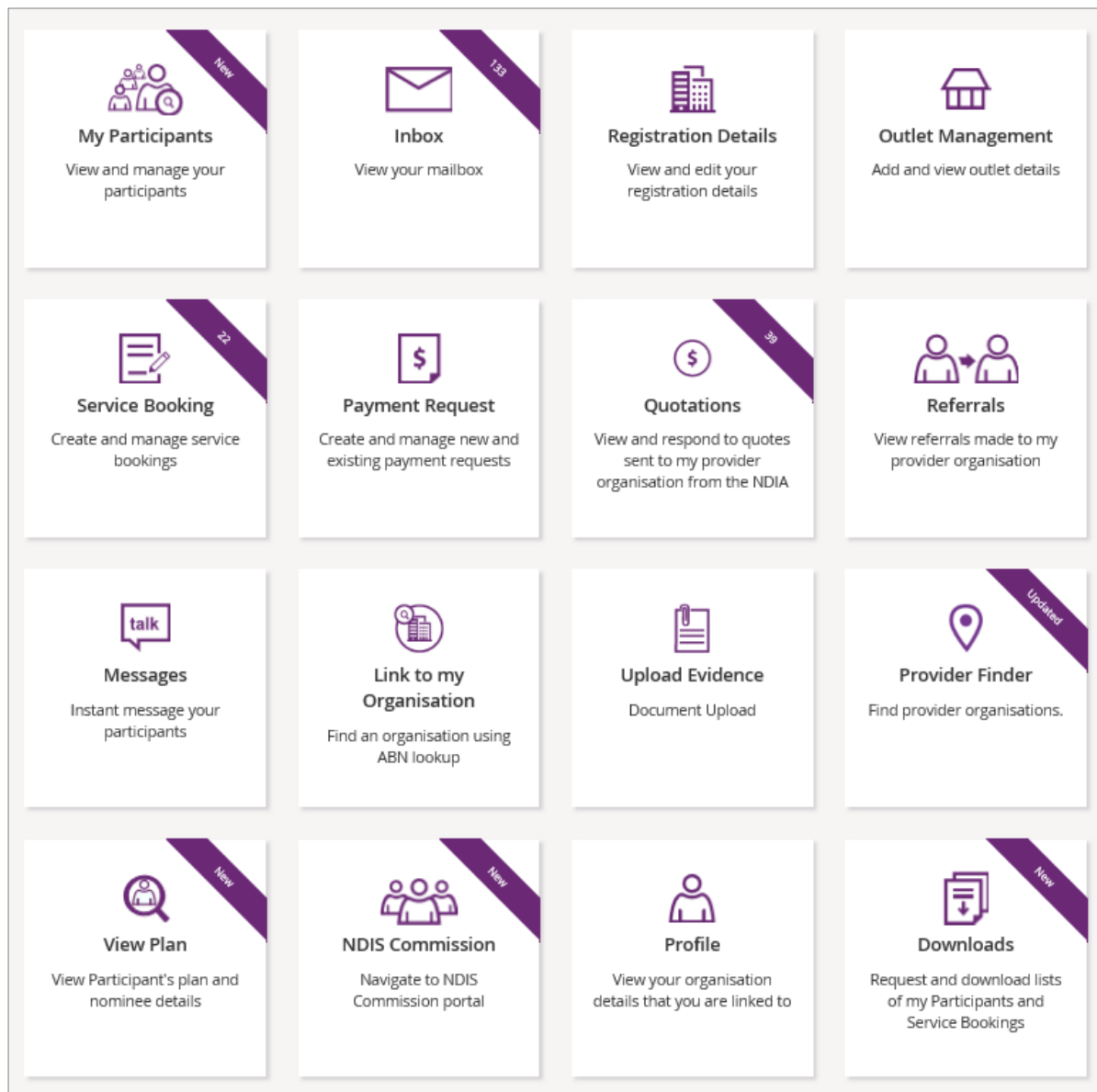
The screenshot shows the myplace provider portal interface. At the top, there is a purple header bar with a home icon and 'Skip to main content' on the left, and 'Hello Graham Jones' with a dropdown arrow on the right. Below the header, the myplace logo is on the left, and 'Switch to NDIS Commission' with a dropdown arrow and a question mark icon is on the right. The main content area features a purple box titled 'Select a Provider' with the instruction 'Select a provider you want to act on behalf of'. Below this is a section titled 'Organisation Details' containing a table with two columns: 'Organisation Name' and 'Provider Number'.

Organisation Name	Provider Number
RODGER, LIAM	4050003606
ADELAIDE WHEEL & RIM	4050004214
AAA MOVERS	4050004745






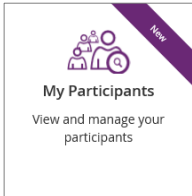
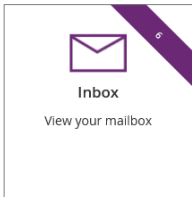
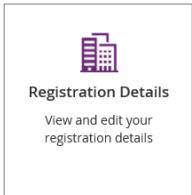
The **myplace** home page displays.

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.

myplace section	Function
	<p>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.</p> <p>Refer to Module 9 (for existing providers) and Module 10 (for new providers) of the Provider Toolkit to link to other provider organisations.</p> <p>If you only work for one provider organisation, you do not need to change any settings here.</p>
	<p>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.</p>
	<p>Select this icon at any time to return to the myplace home page.</p>
	<p>Select this icon for simple explanations of the functions displayed on the screen.</p>
	<p>View and manage your participants.</p>
	<p>View messages and letters sent to you by the NDIA.</p>
	<p>View and edit² your registration details, including updates to Registration groups and Professions.</p>

² Edit Registration details is only available in jurisdictions which have not yet transitioned these functions to the NDIS Quality and Safeguards commission.

myplace section	Function
 <p>Outlet Management Add and view outlet details</p>	View and edit ³ your organisation's outlet details.
 <p>Service Booking Create and manage service bookings</p>	Create and manage service bookings with participants.
 <p>Payment Request Create and manage new and existing payment requests</p>	Create and manage new and existing payment requests.
 <p>Quotations View and respond to quotes sent to my provider organisation from the NDIA</p>	View and respond to quotes sent to you by the NDIA.
 <p>Referrals View referrals made to my provider organisation</p>	View referrals made to your organisation.
 <p>Messages Instant message your participants</p>	Send instant messages to your Participants.
 <p>Link to my Organisation Find an organisation using ABN lookup</p>	Link to your organisation/s, in order to view them through the myplace provider portal.

³ Edit outlet details is only available in jurisdictions which have not yet transitioned these functions to the NDIS Quality and Safeguards commission.

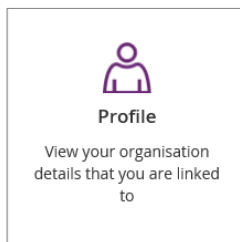
myplace section	Function
 Upload Evidence Document Upload	Upload required documents. ⁴
 Provider Finder Find provider organisations.	Search for providers within a certain location.
 View Plan View Participant's plan and nominee details	View plan details when granted consent by a participant.
 NDIS Commission Navigate to NDIS Commission portal	Navigate to the NDIS Commission portal.
 Profile View your organisation details that you are linked to	View and edit information and contact details for yourself and your organisation.
 Downloads Request and download lists of my Participants and Service Bookings	Request and download service bookings information, or information for participants that your organisation has active service bookings with.

⁴ Upload evidence for registration is only available in jurisdictions which have not yet transitioned these functions to the NDIS Quality and Safeguards Commission.

Provider portal navigation

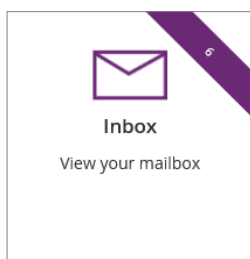
Using a function

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.

For 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**.

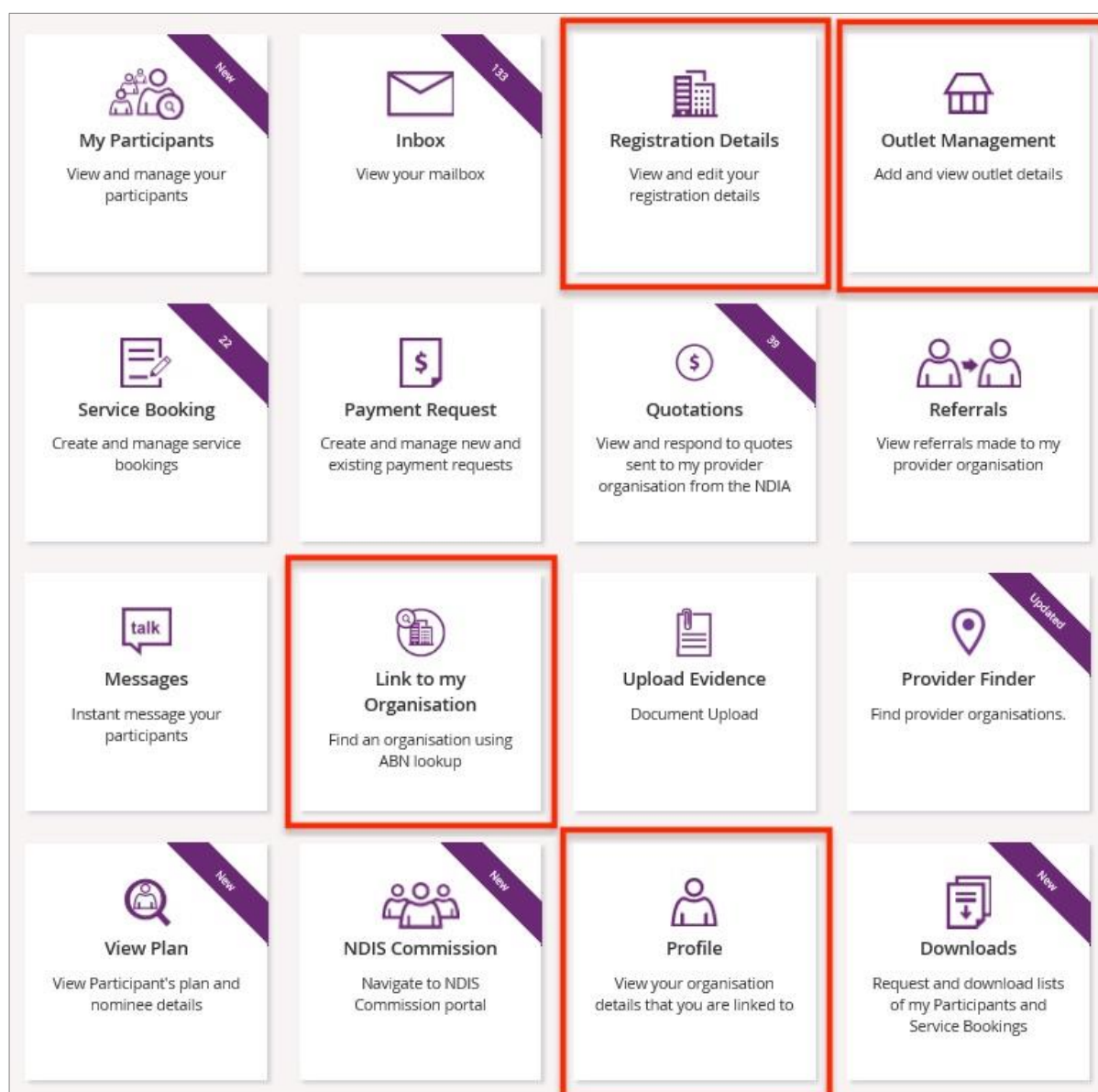
Maintaining your organisation and personal details

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).⁵
- Manage your **Outlets** (the times and places from which you deliver services).⁶
- Manage the organisations which **Link to my Organisation** (the organisations you work for).

⁵ 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).

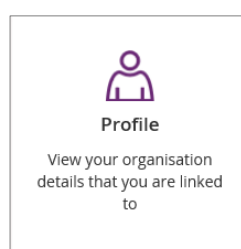
⁶ Maintain outlets is only available in jurisdictions which have not yet transitioned these functions to the NDIS Quality and Safeguards Commission (VIC, QLD, ACT, NT, TAS and WA).



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.

Home / Profile

Profile
View your profile details below.

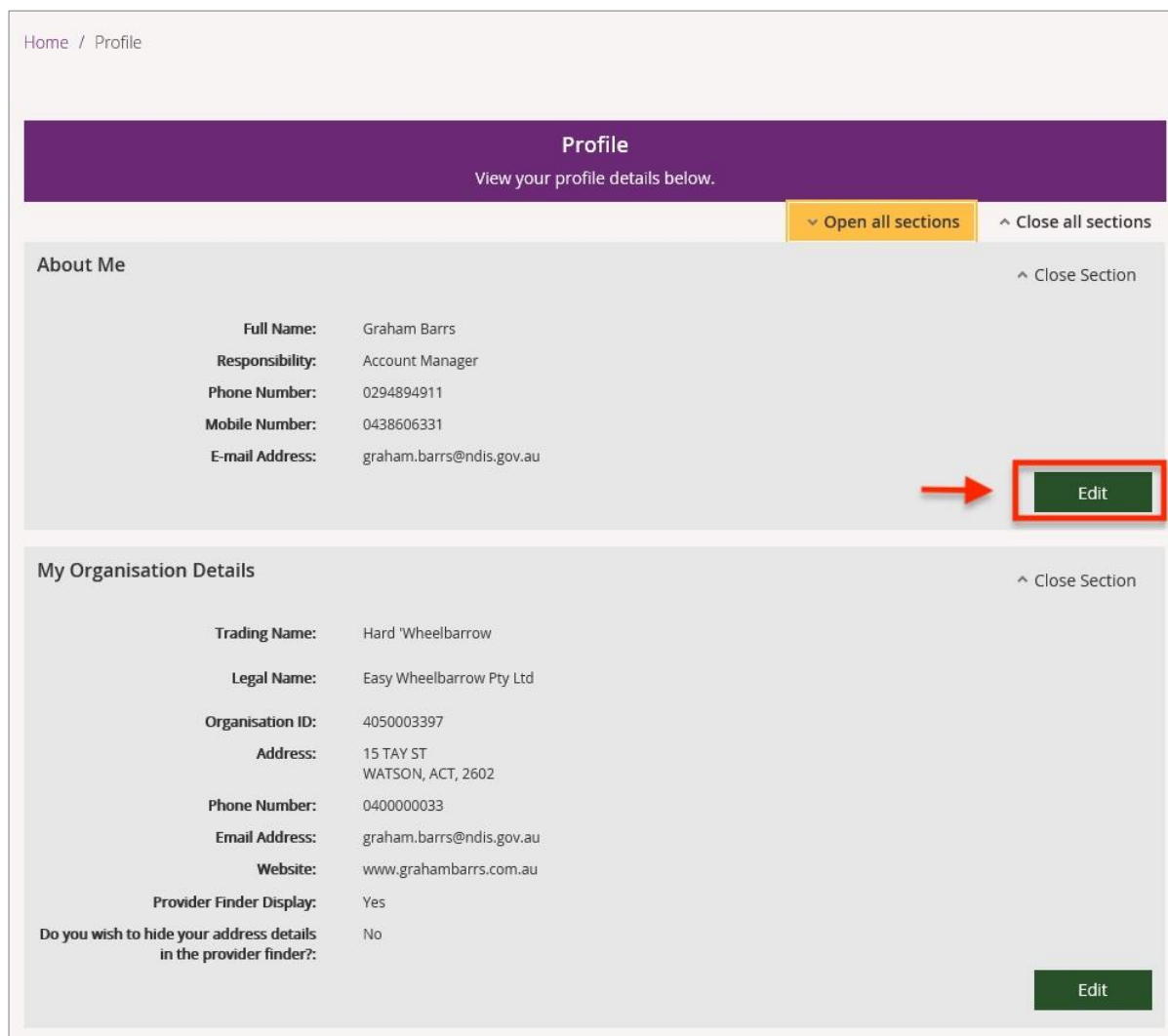
 ⌵ Open all sections ⌶ Close all sections

About Me	⌵ Open Section
My Organisation Details	⌵ Open Section
My Pending Approvals	⌵ Open Section
How Can NDIA Contact Me?	⌵ Open Section
Organisational Staff	⌵ Open Section
Bank Details	⌵ Open Section

⌵ Open all sections ⌶ Close all sections

About me

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



Home / Profile

Profile

View your profile details below.

Open all sections Close all sections

About Me

Close Section

Full Name:	Graham Barrs
Responsibility:	Account Manager
Phone Number:	0294894911
Mobile Number:	0438606331
E-mail Address:	graham.barrs@ndis.gov.au

Edit

My Organisation Details

Close Section

Trading Name:	Hard 'Wheelbarrow
Legal Name:	Easy Wheelbarrow Pty Ltd
Organisation ID:	4050003397
Address:	15 TAY ST WATSON, ACT, 2602
Phone Number:	0400000033
Email Address:	graham.barrs@ndis.gov.au
Website:	www.grahambarrs.com.au
Provider Finder Display:	Yes
Do you wish to hide your address details in the provider finder?:	No

Edit

2. Enter your changed details and select **Update**.

Home / Contact Details

Edit Contact Details

Edit your contact details below

Full Name:	GrahamBarrs
Responsibility:	Account Manager
Phone Number:	<input type="text" value="0294894911"/>
Mobile Number:	<input type="text" value="0438606333"/>
Email Address: *	<input type="text" value="graham.barrs@ndis.gov.au"/>

[Cancel](#) [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.

Home / Profile

Profile

View your profile details below.

▼ Open all sections ▲ Close all sections

About Me ▼ Open Section

My Organisation Details ▲ Close Section

Trading Name:	
Legal Name:	
Organisation ID:	4050003397
Address:	15 TAY ST WATSON, ACT, 2602
Phone Number:	0400000033
Email Address:	graham.barrs@ndis.gov.au
Website:	www.grahambarrs.com.au
Provider Finder Display:	Yes
Do you wish to hide your address details in the provider finder?:	No

[Edit](#)


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**.

Home / Edit My Organisation Details

Edit My Organisation Details

Choose if you would prefer to display details of the organisation on the provider finder

Trading Name:	
Legal Name:	
Organisation ID:	4050003397
Address:	15 TAY ST WATSON, ACT, 2602
Telephone Number:	0400000033
Email:	graham.barrs@ndis.gov.au
Website:	www.grahambarrs.com.au
Provider Finder Display:	<input checked="" type="radio"/> Yes <input type="radio"/> No 
Do you wish to hide your address details in the provider finder?:	<input type="radio"/> Yes <input checked="" type="radio"/> No

CancelUpdate

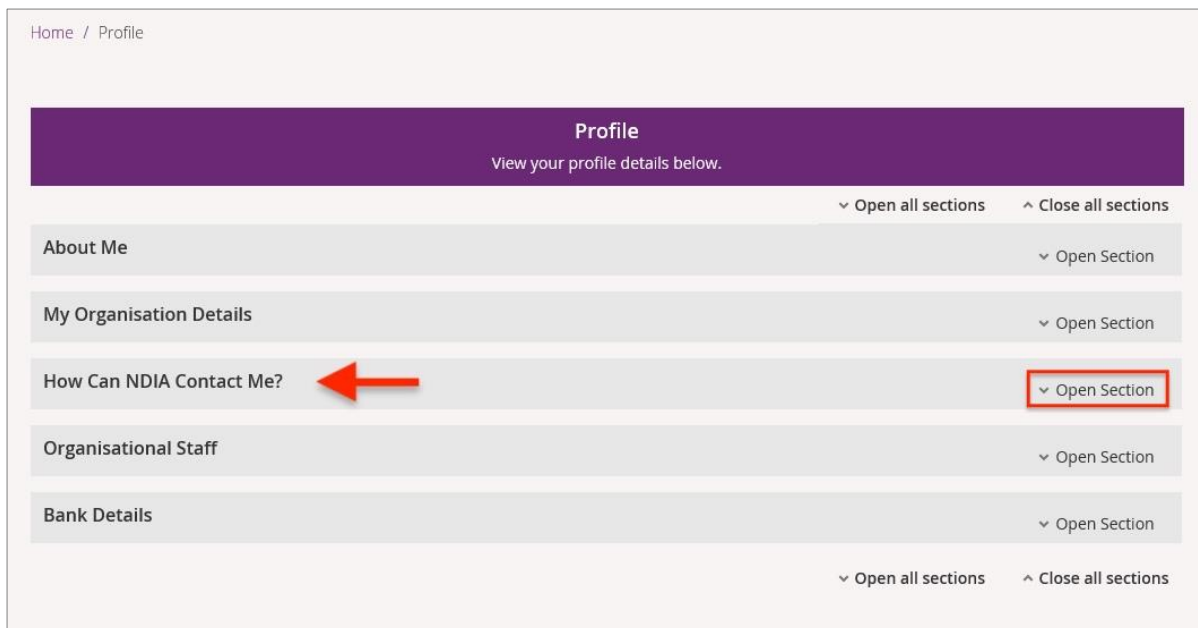
How Can NDIA Contact Me?

Nominate how often your organisation wants to be notified about changes to service bookings. You can choose to be notified:

- Never
- Immediately`
- Daily
- Weekly

Note: You will only be notified about service bookings that your organisation needs to action.

1. Select 'Open Section' to view or edit your information.



Home / Profile

Profile

View your profile details below.

Open all sections Close all sections

About Me Open Section

My Organisation Details Open Section

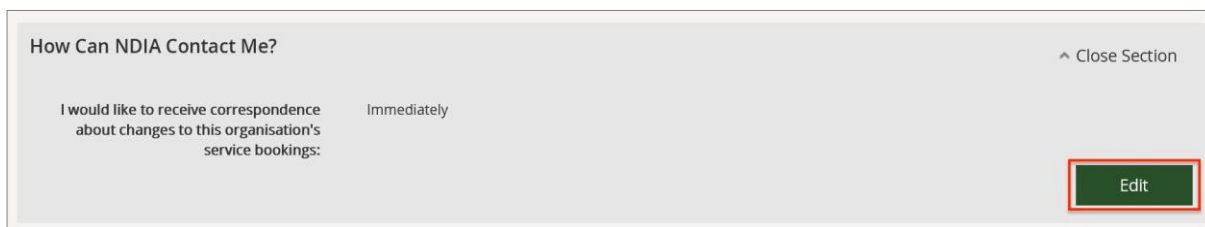
How Can NDIA Contact Me? Open Section

Organisational Staff Open Section

Bank Details Open Section

Open all sections Close all sections

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



How Can NDIA Contact Me? Close Section

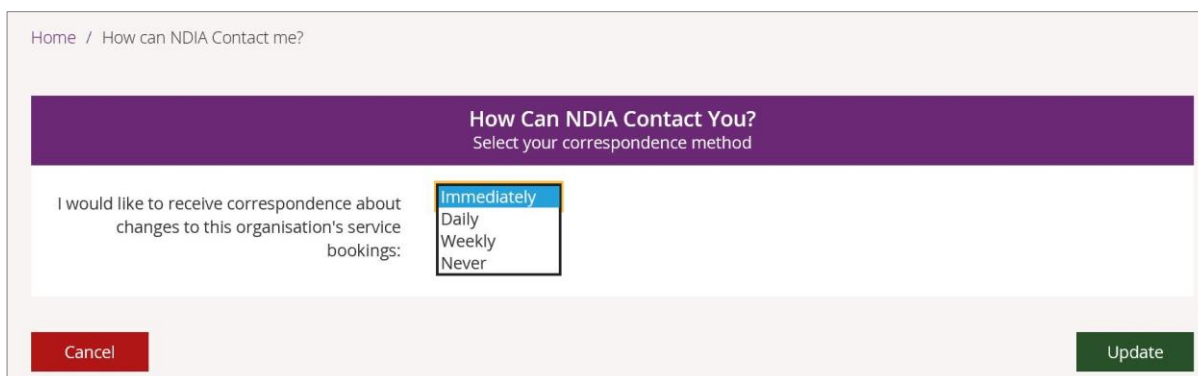
I would like to receive correspondence about changes to this organisation's service bookings: Immediately

Edit

3. Choose from the dropdown how often you wish to receive notifications and select

Update:

- Never
- Immediately
- Daily
- Weekly



Home / How can NDIA Contact me?

How Can NDIA Contact You?

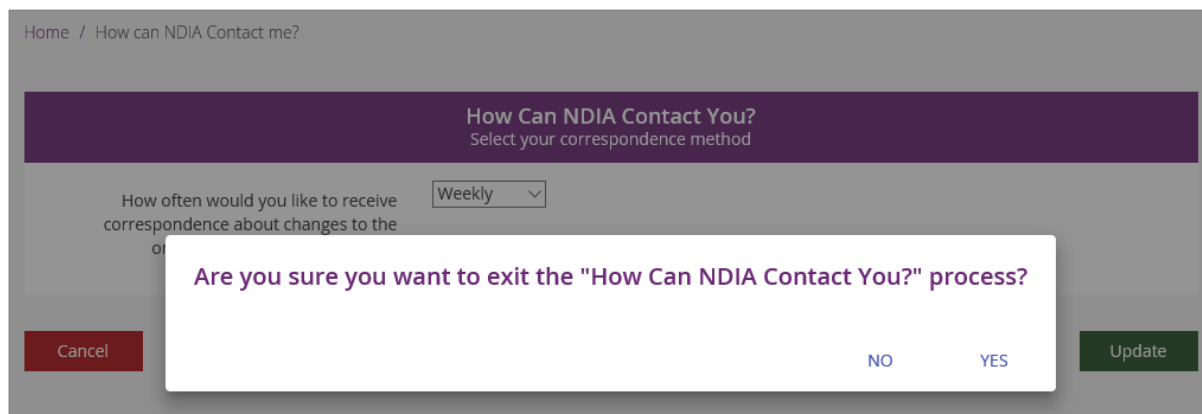
Select your correspondence method

I would like to receive correspondence about changes to this organisation's service bookings: Immediately

Cancel Update

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.



The screenshot shows the 'How Can NDIA Contact You?' screen. At the top, it says 'Select your correspondence method'. Below this, there is a dropdown menu set to 'Weekly'. A confirmation popup is displayed in the center, asking 'Are you sure you want to exit the "How Can NDIA Contact You?" process?'. The popup has 'NO' and 'YES' buttons. At the bottom of the screen, there are 'Cancel', 'Update', and 'Yes' buttons.

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:



Contact type responsibility role	Number allowed (per org)	Service bookings	Payment requests	Add/ Remove contacts	Update bank account
Account manager	Multiple	✓	✓	✓	✓
Primary contact	One	✓	✓	✗	✗
Alternative contact	Unlimited	✓	✓	✗	✗

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**.

Organisational Staff						^ Close Section
Name	Contact Type	Start Date	End Date	Status	Action	
Bane Barrs	Alternative Contact	26/09/2018	31/12/9999	Approved	End Role Add Role	 
	Alternative Contact	18/09/2018	25/09/2018	Ended	Add Role	
	Alternative Contact	14/09/2018	17/09/2018	Ended	Add Role	
	Alternative Contact	22/07/2018	13/09/2018	Ended	Add Role	
dalit sharma	Primary Contact	23/08/2018	31/12/9999	Approved	Add Role	
	Account Manager	15/02/2018	31/12/9999	Approved	End Role Add Role	
	Primary Contact	06/06/2018	22/08/2018	Ended	Add Role	
	Alternative Contact	14/02/2018	05/06/2018	Ended	Add Role	
	Alternative Contact	14/10/2016	15/10/2016	Ended	Add Role	

3. Select the contact type from the **Contact Type** dropdown and select **Update** to save the record.

[Home](#) / [Add role](#)

Add Role

Add contact roles for your organisational staff

Full Name: Louise Davies

Contact Type: *

Please select
Primary
Account Manager

Cancel

Update

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

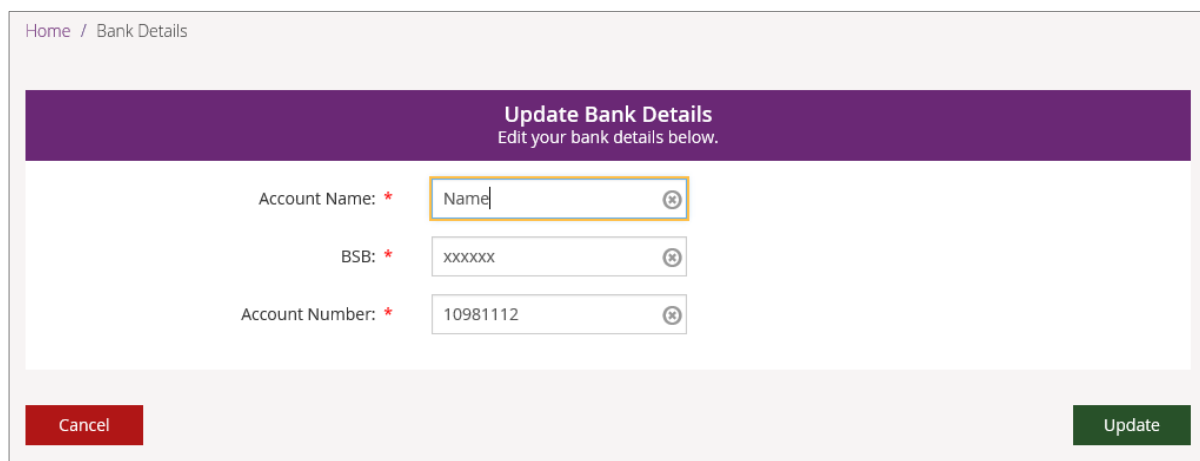
1. To add bank account details, select **Add Bank Detail** from the **Bank Details** section.

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

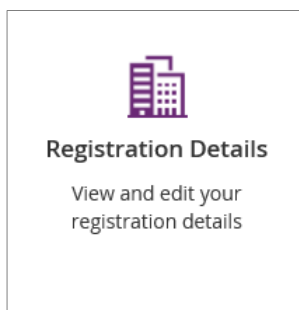
From 1 July 2018, you need to maintain your registration details and registration groups through either the NDIA (provider portal), or the NDIS Commission (portal for providers), or both, according to the states and territories to which the registration applies. The NDIA and NDIS portals provide links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

Function	Provider type	NDIA	NDIS Commission
Provider registration	New provider registration NSW/SA		X
	New provider registration other states/territories (except NSW/SA)	X	
	Provider registration in NSW/SA <u>and</u> other states/territories	X	X
<ul style="list-style-type: none"> • Add / edit registration group • Add / edit outlets 	Registered providers NSW/SA		X
	Registered provider other states/territories (except NSW/SA)	X	
	Registered provider NSW/SA <u>and</u> other states/territories	X	X
Organisational detail changes: <ul style="list-style-type: none"> • Address • Contact details etc 	NSW/SA		X
	Other states/territories (except NSW/SA)	X	
	NSW/SA and other state/s		X
Edit bank account details	All providers	X	

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**.

Home / Registration Details

Registration Details

Manage your registration details

Registration Group	Region	Start Date	End Date	Status	Suspension Start Date	Suspension End Date	Actions
✓ Accommodation/Tenancy	Aust Capital Terr	11/10/2017	31/12/9999	Submitted	N/A	N/A	
✓ Home Modification	Aust Capital Terr	18/10/2017	18/10/2020	Submitted	N/A	N/A	
✓ Group/Centre Activities	Aust Capital Terr	18/10/2017	18/10/2030	Approved	N/A	N/A	
✓ Assist-Life Stage, Transition	Aust Capital Terr	23/10/2017	31/12/9999	Approved	N/A	N/A	
✓ Assist-Life Stage, Transition	New South Wales	23/10/2017	31/12/9999	Submitted	N/A	N/A	
✓ Development-Life Skills	Aust Capital Terr	23/10/2017	31/12/9999	Approved	N/A	N/A	
✓ Development-Life Skills	New South Wales	23/10/2017	31/12/9999	Submitted	N/A	N/A	
✓ Support Coordination	Aust Capital Terr	23/10/2017	31/12/9999	Approved	N/A	N/A	
✓ Support Coordination	New South Wales	23/10/2017	31/12/9999	Submitted	N/A	N/A	
✓ Therapeutic Supports	Aust Capital Terr	25/03/2018	01/04/2018	Submitted	N/A	N/A	
✓ Specialised Driver Training	Northern Territory	23/04/2018	31/12/9999	Draft	N/A	N/A	
✓ Plan Management	New South Wales	27/04/2018	31/12/9999	Submitted	N/A	N/A	
✓ Daily Tasks/Shared Living	New South Wales	30/04/2018	31/12/9999	Submitted	N/A	N/A	
✓ Daily Tasks/Shared Living	Aust Capital Terr	30/04/2018	01/05/2018	Approved	N/A	N/A	
✓ Daily Tasks/Shared Living	Aust Capital Terr	29/08/2018	31/12/9999	Approved	N/A	N/A	

[Back](#)[Add Registration Group](#)

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

Home / Registration Details / Add Registration Details

Add Registration Group

Add new registration groups for your organisation

Required fields are marked with an asterisk (*)

Registration Groups: * ?

State(s)/Territories: * ?

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

Home / Registration Details / Add Registration Details

Add Registration Group

Add new registration groups for your organisation

Required fields are marked with an asterisk (*)

Registration Groups: * ?

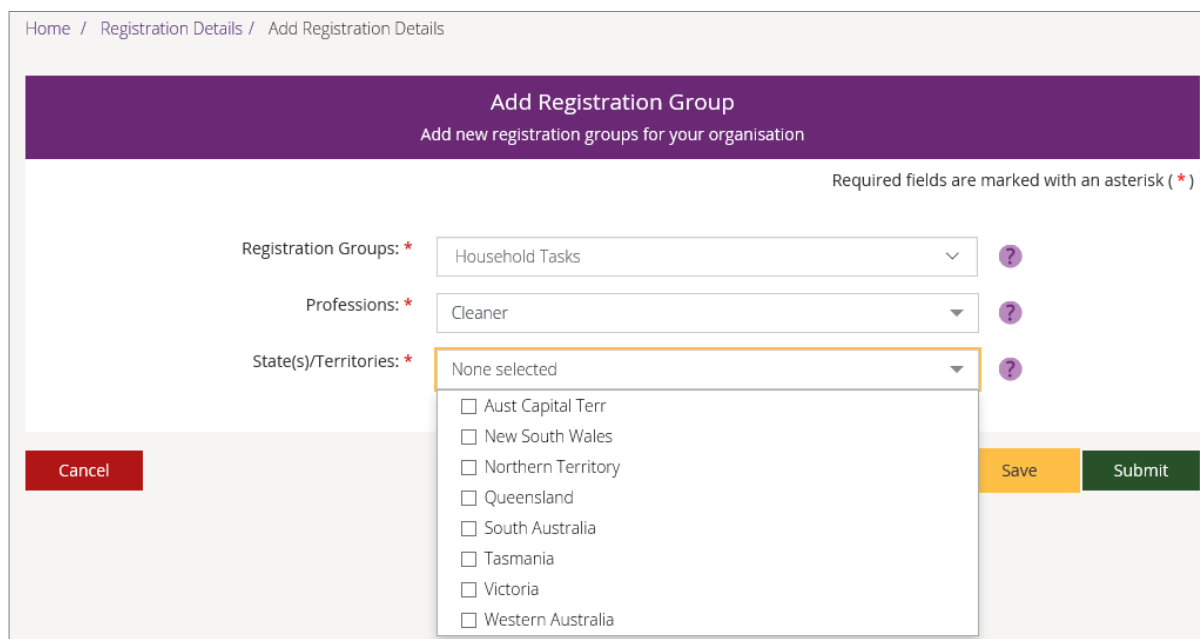
Professions: * ?

State(s)/Territories: * ?

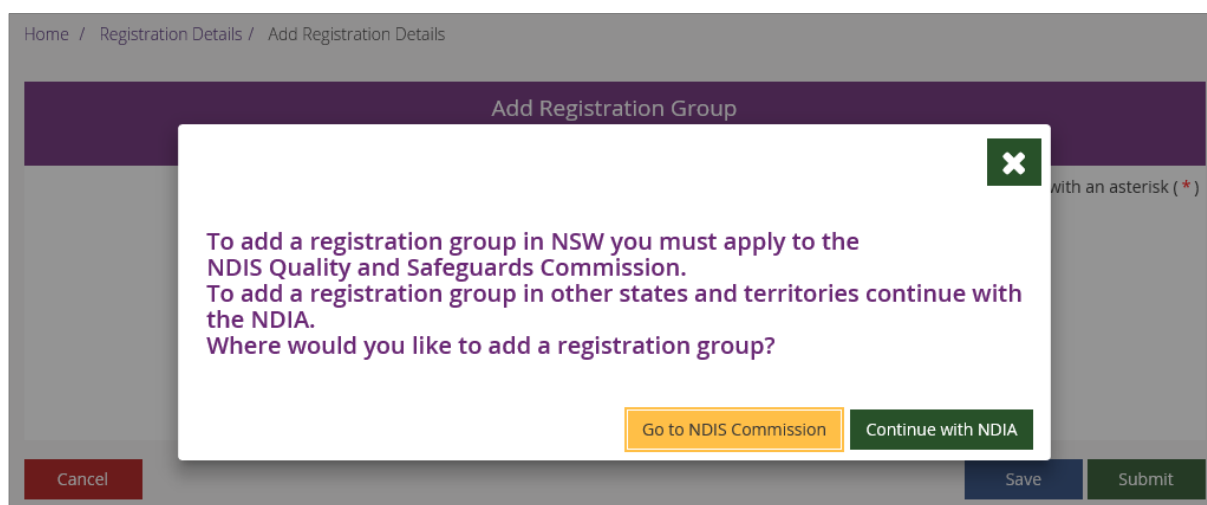
☐ Cleaner
☐ Gardener
☐ Not Stated
☐ Other

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**.

Home / Registration Details / Add Registration Details

Add Registration Group

Add new registration groups for your organisation

Required fields are marked with an asterisk (*)

Registration Groups: * ?

Professions: * ?

State(s)/Territories: * ?


☒ Aust Capital Terr
☒ New South Wales
☐ Northern Territory
☐ Queensland
☐ South Australia
☐ Tasmania
☐ Victoria
☐ Western Australia

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

Home / Registration Details

Registration Details

Manage your registration details

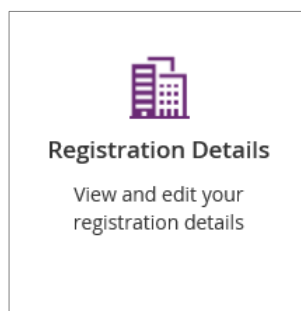
 Registration details have been successfully submitted.

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.














- 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.

Home / Registration Details

Registration Details							
Manage your registration details							
Registration Group	Region	Start Date	End Date	Status	Suspension Start Date	Suspension End Date	Actions
▼ Accommodation/Tenancy	National	01/01/2016	31/12/9999	Approved	N/A	N/A	→ 
▼ Assist Access/Maintain Employ	National	01/01/2016	31/12/9999	Approved	N/A	N/A	
▼ Assist Prod-Pers Care/Safety	National	01/01/2016	31/12/9999	Approved	N/A	N/A	
▼ Group/Centre Activities	National	01/01/2016	31/12/9999	Approved	N/A	N/A	
▼ Custom Prosthetics	National	01/01/2016	31/12/9999	Approved	N/A	N/A	
▼ Hearing Services	National	01/01/2016	31/12/9999	Approved	N/A	N/A	
▼ Spec Support Employ	National	01/01/2016	31/12/9999	Approved	N/A	N/A	
▼ Support Coordination	National	01/01/2016	31/12/9999	Approved	N/A	N/A	
▼ Specialised Disability Accommodation	National	01/01/2016	31/12/9999	Approved	N/A	N/A	
▼ Assistance Animals	National	01/01/2016	31/12/9999	Approved	N/A	N/A	

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


Registration Details							
Manage your registration details							
Registration Group	Region	Start Date	End Date	Status	Suspension Start Date	Suspension End Date	Actions
▼ Assistive Equip-Recreation	South Australia	11/05/2018	11/05/2019	Approved	N/A	N/A	
▼ Vehicle modifications	New South Wales	11/05/2018	11/05/2019	Approved	N/A	N/A	
▼ Assistive Equip-Recreation						N/A	
▼ Vehicle modifications						N/A	
▼ Development-Life Skills						N/A	
▼ Behaviour Support						N/A	
▼ Behaviour Support						N/A	
▼ Development-Life Skills	South Australia	11/05/2018	11/05/2019	Approved	N/A	N/A	
▼ Personal Mobility Equipment	Western Australia	15/05/2018	31/12/9999	Approved	N/A	N/A	
▼ Early Childhood Supports	Queensland	11/05/2018	14/05/2018	Approved	N/A	N/A	
▼ Personal Mobility Equipment	Victoria	15/05/2018	31/12/9999	Approved	N/A	N/A	

You can edit this registration group only through the NDIS Quality and Safeguards Commission. Please select an option.

Go to NDIS Commission

Select another Registration Group

Contact us | Sitemap | NDIS Commission | Accessibility | Browsers | Privacy Notice | Terms of use | Feedback

Powered by 

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**.

Home / Registration Details / Edit Registration Details

Edit Registration Group

Edit your existing registration group details below

Required fields are marked with an asterisk (*)

Registration Groups: Group/Centre Activities

State(s)/Territories: Aust Capital Terr

Status: Approved

Start date: 18/10/2017

End date: 18/10/2030

Action: *

No Action

Suspend

Revoke

Cancel Submit

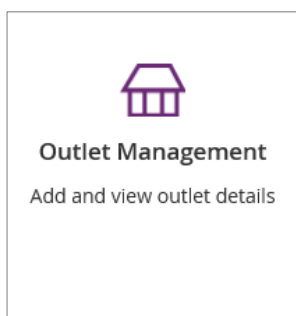
Outlet management

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.

Home / Outlet

Outlet Management

Below are the outlet details for your organisation

Required fields are marked with an asterisk (*)

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

First Prev Page 1 of 1 Next Last

Please select the state or territory in which your outlet is providing services *

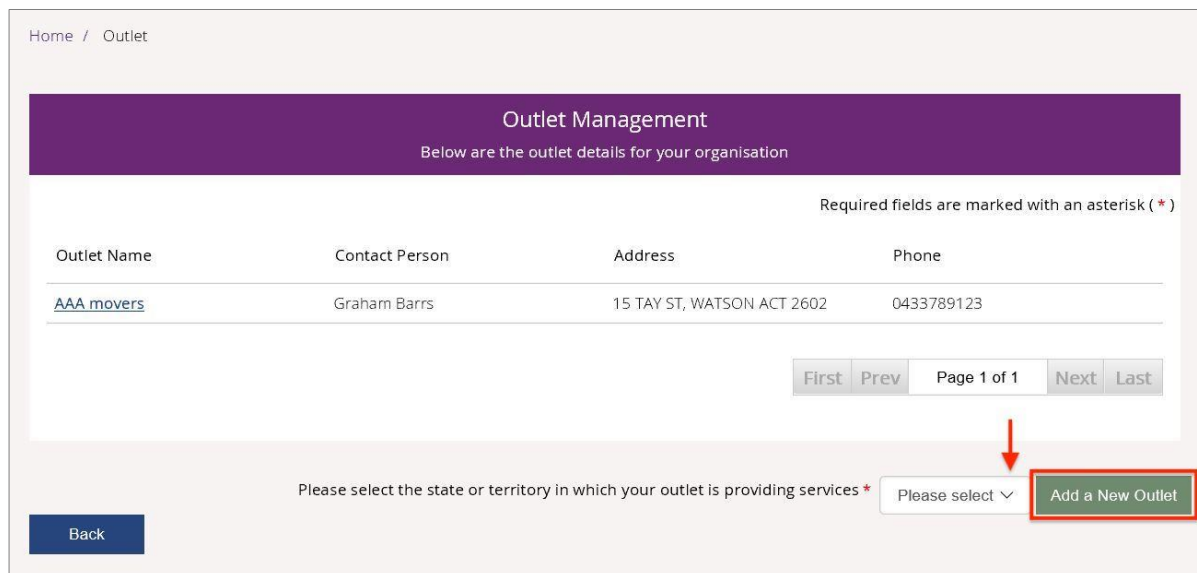
Please select ▾

Add a New Outlet

Back

Add a new outlet

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



Home / Outlet

Outlet Management

Below are the outlet details for your organisation

Required fields are marked with an asterisk (*)

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

First Prev Page 1 of 1 Next Last

Please select the state or territory in which your outlet is providing services *

Please select

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.

Home / Outlet / Add New Outlet Details

Add New Outlet Details
 You can add new outlet details below

Required fields are marked with an Asterisk (*)

Outlet Details

Outlet Name:* ←

Outlet Contact Person:* ←

Outlet Phone Number:* ←

Outlet Email Address:

Outlet Status:* ←

Display in Provider Finder: ☒ Yes ☐ No ←

Do you wish to hide your address details in the provider finder?: ☐ Yes ☒ No ←

Address Details

Address:

Supplementary:

Street 1:* ←

City:* ←

State:* ←

Post Code:* ←

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.

Service Details

Locations of Services: *

ACT

Services Offered: *

Select/Unselect All	Registration Groups	Professions
<input type="checkbox"/>		
<input checked="" type="checkbox"/>	Assist-Life Stage, Transition	Developmental Educators
<input type="checkbox"/>	Assist-Life Stage, Transition	Disability Support Worker
<input type="checkbox"/>	Assist-Life Stage, Transition	Social Worker
<input type="checkbox"/>	Assist-Life Stage, Transition	Welfare Worker
<input checked="" type="checkbox"/>	Daily Tasks/Shared Living	Developmental Educators
<input type="checkbox"/>	Daily Tasks/Shared Living	Disability Support Worker

Operating Hours

Day	Open	Start Time	End Time
Sunday	<input type="checkbox"/>	09:00	17:00
Monday	<input checked="" type="checkbox"/>	09:00	17:00
Tuesday	<input checked="" type="checkbox"/>	09:00	17:00
Wednesday	<input checked="" type="checkbox"/>	09:00	17:00
Thursday	<input checked="" type="checkbox"/>	09:00	17:00
Friday	<input checked="" type="checkbox"/>	09:00	17:00
Saturday	<input type="checkbox"/>	09:00	17:00

Cancel

Submit


A message displays stating that the outlet has been created successfully.

Home / Outlet

Outlet Management

Below are the outlet details for your organisation

Required fields are marked with an asterisk (*)

 Outlet created successfully

Outlet Name	Contact Person	Address	Phone
Adelaide Rim and Tyre	Graham Jones	sturt street, Adelaide SA 5000	0438606331

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.

Home / Outlet

Outlet Management

Below are the outlet details for your organisation

Required fields are marked with an asterisk (*)

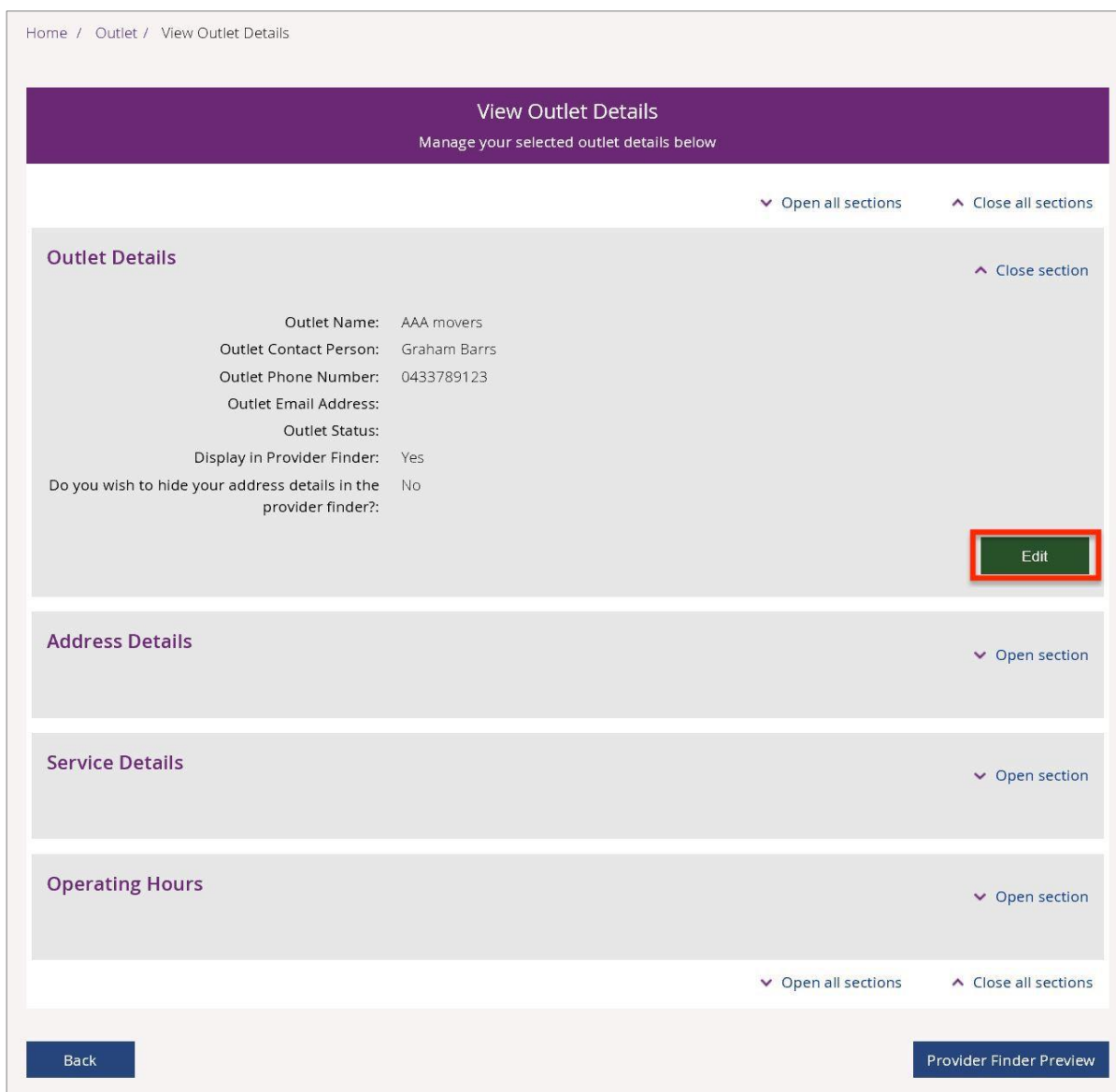
Outlet Name	Contact Person	Address	Phone
AAA movers 	Graham Jones	TAY ST, WATSON ACT 2602	0433789123

First Prev Page 1 of 1 Next Last

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

Back

The **View Outlet Details** page displays.



Home / Outlet / View Outlet Details

View Outlet Details

Manage your selected outlet details below

▼ Open all sections ▲ Close all sections

Outlet Details

▲ Close section

Outlet Name: AAA movers
Outlet Contact Person: Graham Barrs
Outlet Phone Number: 0433789123
Outlet Email Address:
Outlet Status:
Display in Provider Finder: Yes
Do you wish to hide your address details in the provider finder?: No

Edit

Address Details

▼ Open section

Service Details

▼ Open section


Operating Hours

▼ Open section

▼ Open all sections ▲ Close all sections

[Back](#) [Provider Finder Preview](#)

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**.

Home / Outlet / View Outlet Details / Edit Outlet Details

Edit Outlet Details

Edit your existing outlet details below

Required fields are marked with an asterisk (*)

Outlet Details

Outlet Name:*

Outlet Contact Person:*

Phone Number:*

Email Address:

Outlet Status:*

Display in Provider Finder: ☒ Yes ☐ No

Do you wish to hide your address details in the provider finder?: ☐ Yes ☒ No


[Cancel](#) [Save](#)

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

Home / Outlet / View Outlet Details

View Outlet Details

Manage your selected outlet details below

 Outlet details updated successfully!

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

Outlet Details [Close section](#)

Outlet Name: AAA movers

Outlet Contact Person: Graham Jones

Outlet Phone Number: 0433789123

Outlet Email Address:

Outlet Status: Accepting Referrals

Display in Provider Finder: Yes

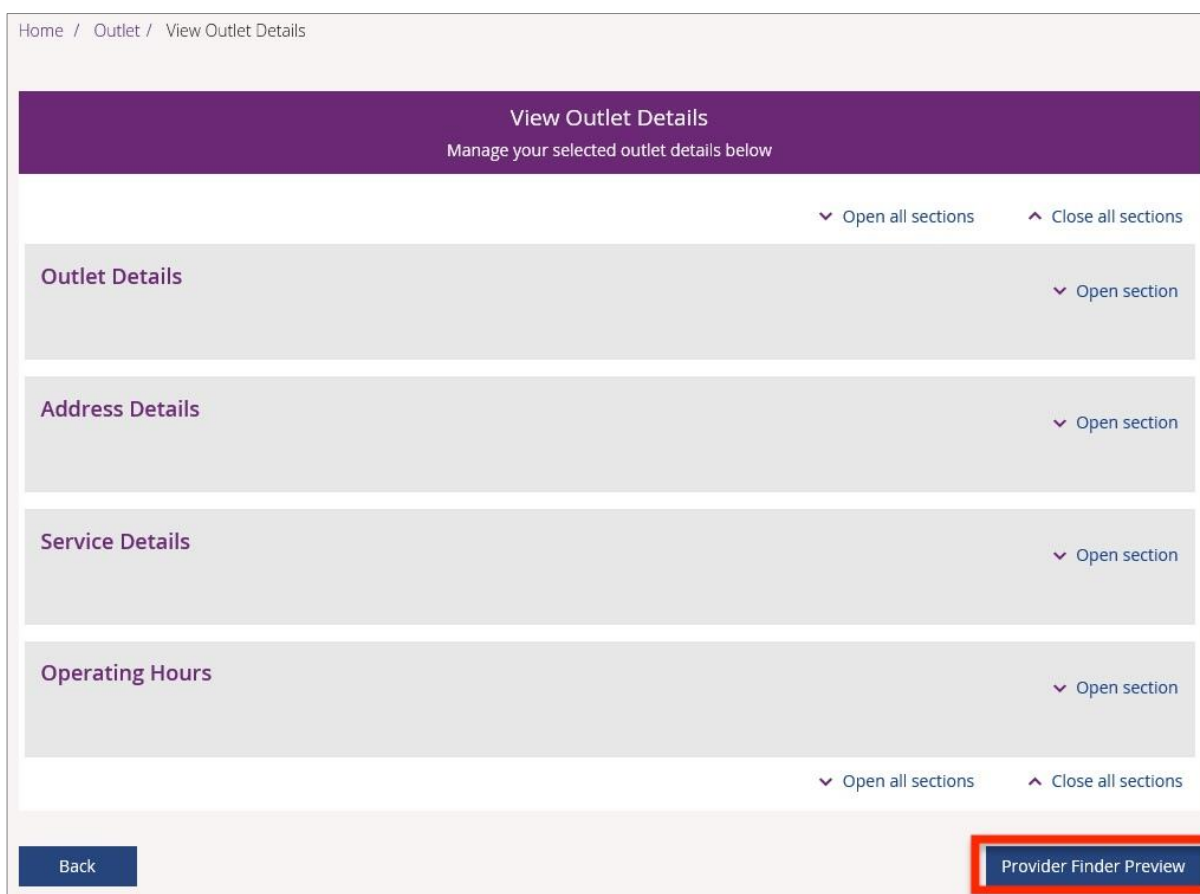
Do you wish to hide your address details in the provider finder?: No

[Edit](#)

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.



Home / Outlet / View Outlet Details

View Outlet Details
Manage your selected outlet details below

▼ Open all sections ▲ Close all sections

Outlet Details ▼ Open section

Address Details ▼ Open section

Service Details ▼ Open section

Operating Hours ▼ Open section

▼ Open all sections ▲ Close all sections

Back **Provider Finder Preview**

The **Provider Finder** view screen, displays.

2. Select **Back** to return to the previous screen.

3. Select **Edit Outlet Details** to make more updates.

[Home](#) / [Provider Finder](#) / [Provider Details](#)

Provider Details

View details of the selected provider


[< Back to outlet details](#)

AAA movers

Organisation Name
AAA MOVERS

Outlet Status
Accepting Referrals

Contact Person
Graham Jones

Contact Details
0433789123
[Visit provider website](#) 
AAA@GMAIL.COM

Address
15 TAY ST, WATSON, ACT, 2602

Services Provided
Audiologist
Not Stated
Physiotherapist
Psychologist

Operating Hours

Day	Start Time	End Time
Sunday	Closed	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	Closed

[< Back to outlet details](#)

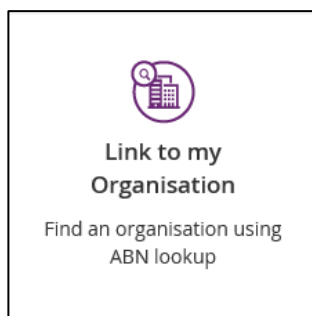
Show Map

Edit Outlet Details

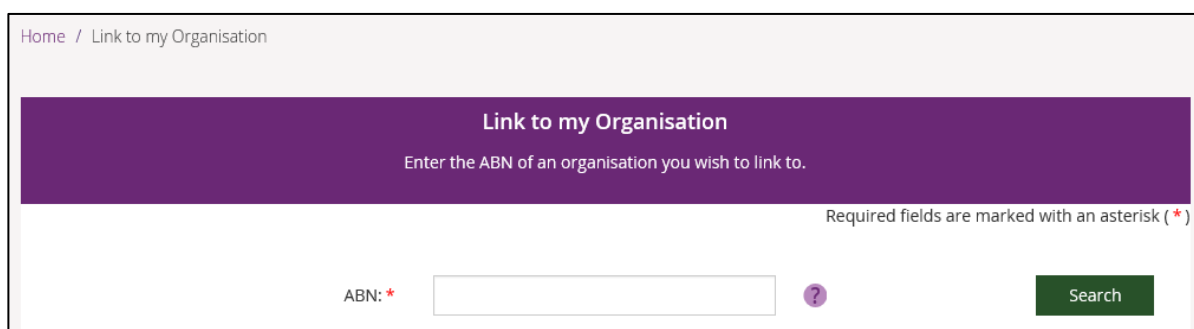
Link to my organisation

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](#).

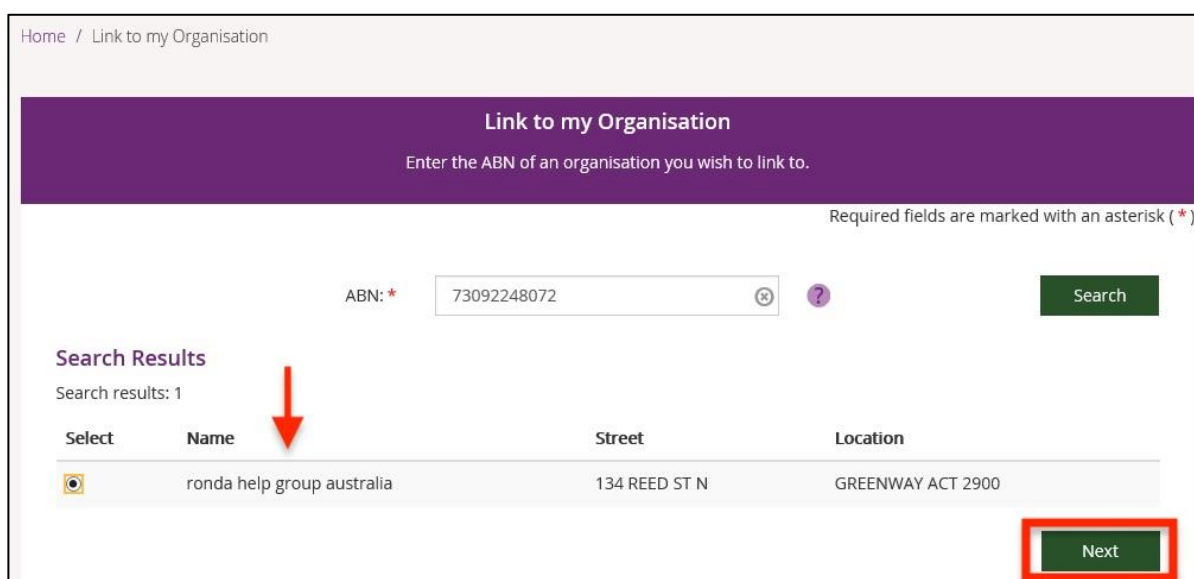
1. Select the **Link to my Organisation** tile on the **myplace** home page.



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

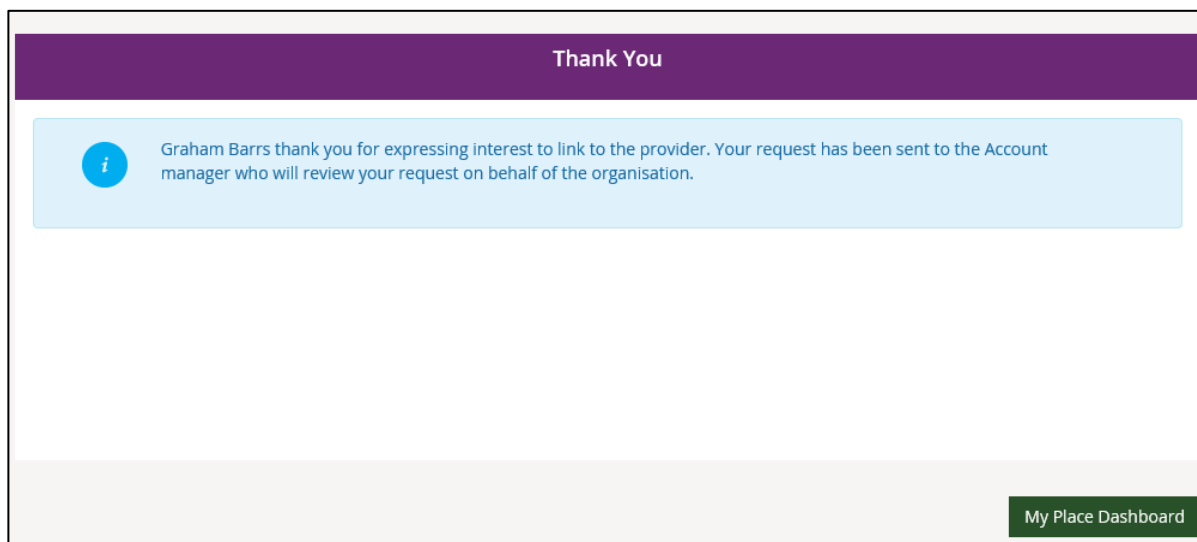
A screenshot of the "Link to my Organisation" form. The header is purple with the title "Link to my Organisation" and the instruction "Enter the ABN of an organisation you wish to link to.". Below the header, there is a text input field labeled "ABN: *" and a green "Search" button. A note on the right says "Required fields are marked with an asterisk (*)".

3. Select the provider from the list and select **Next**.

A screenshot of the "Link to my Organisation" search results page. The header is purple with the title "Link to my Organisation" and the instruction "Enter the ABN of an organisation you wish to link to.". Below the header, there is a text input field labeled "ABN: *" containing the value "73092248072" and a green "Search" button. Below the search bar, the text "Search Results" is followed by "Search results: 1". A table lists the search results with columns "Select", "Name", "Street", and "Location". The first result is "ronda help group australia" with street "134 REED ST N" and location "GREENWAY ACT 2900". A red arrow points to the "Name" column. A green "Next" button is highlighted with a red box at the bottom right. A note on the right says "Required fields are marked with an asterisk (*)".

Select	Name	Street	Location
<input type="radio"/>	ronda help group australia	134 REED ST N	GREENWAY ACT 2900

4. A thank you message displays. Your request is sent through to the provider.



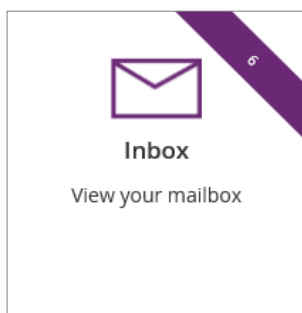
Important note: If you are linking to a provider that does not have a primary contact set up, a new screen will pop up that asks you to provide one.

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 Can NDIA Contact Me?](#) to choose how often you wish to be notified.

Home / Inbox

Inbox
 View all of your provider inbox messages below

Folder: ✉ Messages 18 🗑 Trash

Filter: All ▼

Show: All Unread

➔ Move to Trash 🗑

Showing 1 - 20 of 20 messages

<input type="checkbox"/> From	Subject	Date/time
<input type="checkbox"/> NDIA	Payee Payment Remittance Advice HTML PDF CSV	22/09/2018 12:00 AM
<input type="checkbox"/> NDIA	New Prov- Registration Approved HTML PDF	21/09/2018 12:00 AM
<input type="checkbox"/> NDIA	New Prov- Registration Approved HTML PDF	07/09/2018 12:00 AM
<input type="checkbox"/> NDIA	Recipient Created Tax Invoice (RCTI) HTML PDF CSV	30/07/2018 12:00 AM
<input type="checkbox"/> NDIA	New Prov- Registration Approved HTML PDF	21/06/2018 12:00 AM
<input type="checkbox"/> NDIA	New Prov- Registration Approved HTML PDF	13/06/2018 12:00 AM
<input type="checkbox"/> NDIA	Payee Payment Remittance Advice HTML PDF CSV	08/06/2018 12:00 AM
<input type="checkbox"/> NDIA	New Prov- Registration Approved HTML PDF	06/06/2018 12:00 AM

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.

- 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.
- 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.

Home / Inbox

Inbox
 View all of your provider inbox messages below

Folder: Messages 18 Trash

Show: All Unread

Filter: All

[Move to Trash](#)

Showing 1 - 20 of 20 messages

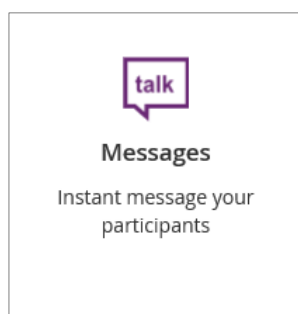
<input type="checkbox"/> From	Subject	Date/time	
<input type="checkbox"/> NDIA	Payee Payment Remittance Advice	HTML PDF CSV	22/09/2018 12:00 AM
<input type="checkbox"/> NDIA	New Prov- Registration Approved	HTML PDF	21/09/2018 12:00 AM
<input type="checkbox"/> NDIA	New Prov- Registration Approved	HTML PDF	07/09/2018 12:00 AM
<input type="checkbox"/> NDIA	Recipient Created Tax Invoice (RCTI)	HTML PDF CSV	30/07/2018 12:00 AM
<input type="checkbox"/> NDIA	New Prov- Registration Approved	HTML PDF	21/06/2018 12:00 AM
<input type="checkbox"/> NDIA	New Prov- Registration Approved	HTML PDF	13/06/2018 12:00 AM
<input type="checkbox"/> NDIA	Payee Payment Remittance Advice	HTML PDF CSV	08/06/2018 12:00 AM
<input type="checkbox"/> NDIA	New Prov- Registration Approved	HTML PDF	06/06/2018 12:00 AM

Messages

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

Starting a new instant message

- Select the **Messages** tile on the **myplace** home page.



- Enter the participant's **NDIS Number** and **Last Name** then select **Search**.

Home / Messages

Messages

View and respond to messages sent to you from a participant you have a service booking with

Required fields are marked with an asterisk (*)

Search


NDIS Number: *


Last name: *

The **Your Conversation** window displays.


Your Conversation


Hi there. This is about your new booking.
05:20 PM






Conversations with


 LAC, vikas
Wednesday 03:39 PM
hey graham sb booking



Quotations, Carl
Tuesday 11:53 AM
yes
13:00 PM



001, MARK INDEX UAT
Tuesday 05:20 PM
hi there

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 service provision

These functions enable you to:

- Find your active Participants
- View a **Participant's plan** (if you provide services to that participant and have their consent).
- 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).
- View and manage your **Payment Requests** (how you submit claims for payment for supports delivered).
- View and respond to **Quotations** (requests for quotes for supports from the Agency or a participant).
- View **Referrals** to your organisation (created by the Agency when a participant would like you to contact them).
- Use the **Provider Finder** (to find additional supports for a participant).
- **Upload Evidence** related to the participant or their supports.

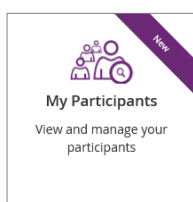
Finding Participants

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.

[Home](#) / [My Participants](#)

My Participants

View and manage your participants













Help on this 

Find a Participant

Enter participant name or NDIS number

Search

Showing 10 of 100 participants

	Plan	Service Bookings	Payment Requests
AnyCust LostCust - 430214131 Plan ends 23/08/2019	View 	View  Create 	Create 
AnyCustomr LastCustomr - 430214325 Plan ends 13/09/2019	View 	View  Create 	Create 
AugCustA AugLastB - 430214203 Plan ends 27/08/2019	View 	View  Create 	Create 

Provider portal - Step-by-step guide



- To search for a participant, type their name or NDIS number in the **Find a Participant** field and select **Search**.

[Home](#) / [My Participants](#)

My Participants
View and manage your participants

Help on this ?

Find a Participant [Search](#)

Showing 10 of 100 participants

	Plan	Service Bookings	Payment Requests
AnyCust LostCust - 430214131 Plan ends 23/08/2019	View	View Create	Create
AnyCustomr LastCustomr - 430214325 Plan ends 13/09/2019	View	View Create	Create
AugCustA AugLastB - 430214203 Plan ends 27/08/2019	View	View Create	Create
Barnsey Tim - 430194473 Plan ends 14/11/2018	View	View Create	Create
Bratt Mann - 430214312 Plan ends 05/09/2020	View	View Create	Create
BRICK HAMMER - 430209864 Plan ends 10/10/2018		View Create	Create
budget test - 430209791 Plan ends 03/10/2018	View	View Create	Create
Childfirst Childlast - 430214305 Plan ends 06/09/2019	View	View Create	Create
COLIN COYOTE 005 - 430213809 Plan ends 27/07/2019	View	View Create	Create
COLIN COYOTE 003 - 430213807 Plan ends 27/07/2019	View	View Create	Create

[First](#) [Prev](#) Page 1 of 10 [Next](#) [Last](#)

[Back](#)

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

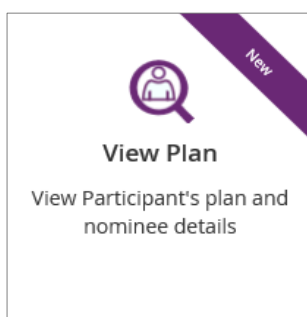
View plan

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.



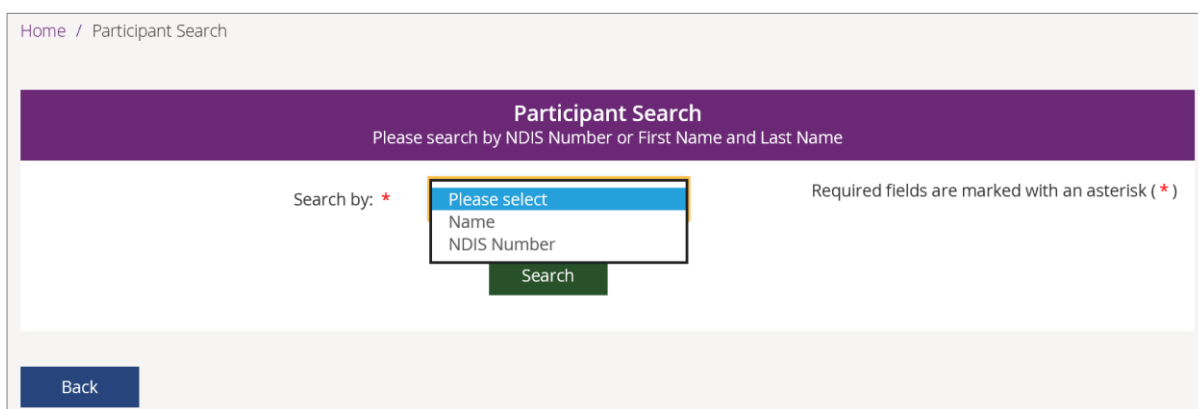
The NDIA requires consent from participants to share their plans with providers. Only participants and their nominees can provide the NDIA with the consent to share their plans with providers. Participants have the choice to either share, or not share their plans with you and can withdraw consent at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

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**.

A screenshot of the 'Participant Search' web form. At the top, there is a purple header bar with the title 'Participant Search' and the instruction 'Please search by NDIS Number or First Name and Last Name'. Below the header, the form has a light gray background. On the left, it says 'Search by: *'. To the right of this is a dropdown menu with a blue border and a white background. The dropdown is open, showing three options: 'Please select' (highlighted in blue), 'Name', and 'NDIS Number'. Below the dropdown is a green 'Search' button. To the right of the search area, there is a note: 'Required fields are marked with an asterisk (*)'. At the bottom left of the form, there is a blue 'Back' button.

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.

Home / Participant Search

Participant Search


Please search by NDIS Number or First Name and Last Name

Search by: * Name Required fields are marked with an asterisk (*)

First Name: * ←

Last Name: * ←

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.






No search results found. Please enter the NDIS number in the format of 9 numeric OR Participant's exact first and last name.

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.

myplace

Switch to NDIS Commission   ←



No search results found. Please enter the NDIS number in the format of 9 numeric OR Participant's exact first and last name.

Home / Participant Search

Participant Search

Please search by NDIS Number or First Name and Last Name

Search by: * Name Required fields are marked with an asterisk (*)

First Name: *

Enter the exact First Name of the participant
Skip Back Next

Last Name: *

After searching for a participant, you will see the **View Participant Plan** page. Select the required participant to open their plan details.

Home / Participant Search

Participant Search

Please search by NDIS Number or First Name and Last Name

Search by: * Required fields are marked with an asterisk (*)

NDIS Number: * ?

Search Results

Participant Name	NDIS Number
AnyCust LostCust	430214131

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.

View Participant's Plan

View details of a participant's plan.

Open all sections

Close all sections

Name:

UAT Tester005

NDIS Number:

430195413

Preferred Name:

Date of Birth:

10/10/2010

Gender:

F

Interpreter Required:

No

Current Plan: 1017571

344 days remaining

Start Date

05/09/2017

End Date

05/09/2019

View Previous Plans

Goals

Open Section

Plan Goals

Goal Type	Description
Health and wellbeing	SIMPLE

How I will achieve this goal

Be able to understand if I am getting the right change when I go shopping. Anne testing - Testing provider

Testing testing for provider

How I will be supported

My LAC will support me to connect to providers who can help me to develop my money handling skills in the community. Anne testing - testing provider

Testing testing - provider

Medium to long term life goals

Goal Type	Description
Learning	COMPLEX

How I will achieve this goal

Determine my job capacity and mainstream eligibility to disability employment supports.

How I will be supported

I can access Centrelink support to determine my job capacity and mainstream eligibility to DES My LAC will support me to connect to services for employment supports.

Participant's Nominee Details

Open Section

Open all sections

Close all sections

Back

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The **View Participant's Historical Plan** page opens.

Home / Participant Search / View Participant's Plan / Previous Plans

View Participant's Historical Plan

View details of a participant's previous plans.

Name:	UAT Tester005	NDIS Number:	430195413
Preferred Name:		Date of Birth:	10/10/2010
Gender:	F	Interpreter Required:	No

Previous Plans

Plan: 1012200	17/01/2017 - 04/09/2017	▼ Open Section
Plan: 1012198	13/01/2017 - 16/01/2017	▼ Open Section

[Back](#)

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

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

Home / Participant Search / View Participant's Plan / Previous Plans

View Participant's Historical Plan

View details of a participant's previous plans.

Name:	UAT Tester005	NDIS Number:	430195413
Preferred Name:		Date of Birth:	10/10/2010
Gender:	F	Interpreter Required:	No

Previous Plans

Plan: 1012200	17/01/2017 - 04/09/2017	▼ Open Section
Plan: 1012198	13/01/2017 - 16/01/2017	▼ Open Section

[Back](#)

Important Note: Help text is available throughout the screens. Simply hover your cursor over the field you need more information about.

Home / Participant Search / View Participant's Plan

View Participant's Plan

View details of a participant's plan.

▼ Open all sections ▲ Close all sections

Name:	UAT Tester005	NDIS Number:	430195413
Preferred Name:		Date of Birth:	10/10/2010
Gender:	F	Interpreter Required:	No

Current Plan: 1017571

344 days remaining

Start Date: 05/09/2017 End Date: 05/09/2019

View Previous Plans

Goals ▼ Open Section

Participant's Nominee Details ▼ Open Section

This section gives you information about participant's nominee details

Done

Back

- 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.
- 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



Goals Open Section

Plan Budget
Current at: Thu Sep 27 2018
Approved Funds: \$44,785.67
Funds Spent: \$141.00 Funds Remaining: \$44,644.67

Capacity Building Close Section
Approved Funds: \$30,993.74
Funds Spent: \$41.00 Funds Remaining: \$30,952.74
Improved life choices
Funds Spent: \$0.00 (includes allocated items)
Funds Remaining: \$1,000.00
Approved Funds: \$1,000.00
Allocated Items(0)
None
Improved daily living
Funds Spent: \$20.00 (includes allocated items)
Funds Remaining: \$1,091.00
Approved Funds: \$1,111.00
Allocated Items(0)
None
Finding and keeping a job
Funds Spent: \$0.00 (includes allocated items)
Funds Remaining: \$2,000.00
Approved Funds: \$2,000.00
Allocated Items(0)
None
Improved health and wellbeing
Funds Spent: \$0.00 (includes allocated items)
Funds Remaining: \$2,000.00
Approved Funds: \$2,000.00
Allocated Items(0)
None
Improved living arrangements
Funds Spent: \$0.00 (includes allocated items)
Funds Remaining: \$2,000.00
Approved Funds: \$2,000.00
Allocated Items(0)
None
Improved learning
Funds Spent: \$0.00 (includes allocated items)
Funds Remaining: \$20,000.00
Approved Funds: \$20,000.00
Allocated Items(0)
None
Improved relationships
Funds Spent: \$0.00 (includes allocated items)
Funds Remaining: \$200.00
Approved Funds: \$200.00
Allocated Items(0)
None
Increased social and community participation
Funds Spent: \$0.00 (includes allocated items)
Funds Remaining: \$2,500.00
Approved Funds: \$2,500.00
Allocated Items(0)
None
Support coordination
Funds Spent: \$21.00 (includes allocated items)
Funds Remaining: \$161.74
Approved Funds: \$182.74
Allocated Items(0)
None

Capital Open Section

Core Open Section

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

Plan Budget
 Current at: Thu Sep 27 2018

Approved Funds: \$44,785.67
 Funds Spent: \$141.00
 Funds Remaining: \$44,644.67

Capacity Building
[Open Section](#)

Capital
[Close Section](#)

Approved Funds: \$0.00
 Funds Spent: \$0.00
 Funds Remaining: \$0.00

Assistive technology
 Funds Spent: \$0.00
 Funds Remaining: \$0.00
Approved Funds: \$0.00

(includes allocated items)

Allocated Items(3)

Item Name	Item No.	Status	Quote Required	Quote Received	Funds Approved(\$)
Mobile Shower Commode - Composite	05_413_0103_1_2	Stated	Yes	No	
Rental - Composite	05_424_0105_1_2	Stated	Yes	No	
Shower Support - Composite	05_415_0103_1_2	Stated	Yes	No	

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.

About Participant Open Section

Current Plan: 1021760

321 days remaining

Start Date

13/08/2018

End Date

13/08/2019

Plan Managed

No

Agency Managed

Yes

Self Managed

Yes

Goals Open Section

Plan Budget

Current at: Thu Sep 27 2018

Approved Funds: \$44,785.67

Funds Spent: \$141.00

Funds Remaining: \$44,644.67

Capacity Building Open Section

Capital Open Section

Core Open Section

Participant's Nominee Details Open Section

Participant community and mainstream supports. Open Section

Open all sections

Close all sections

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.

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.

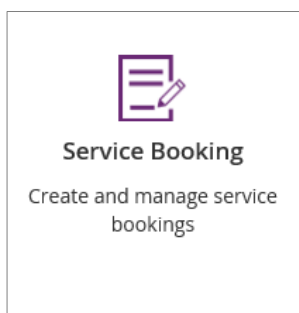
Providers can:

- Create a new service booking with a participant.
- View and edit existing service bookings.
- Accept or reject a new service booking including providing a reason for rejection.
- Accept or reject a change to an existing service booking, including providing a reason for rejection.
- Edit support details on a service booking including duration, price and quantity.
- End a service booking including immediate cancellation.

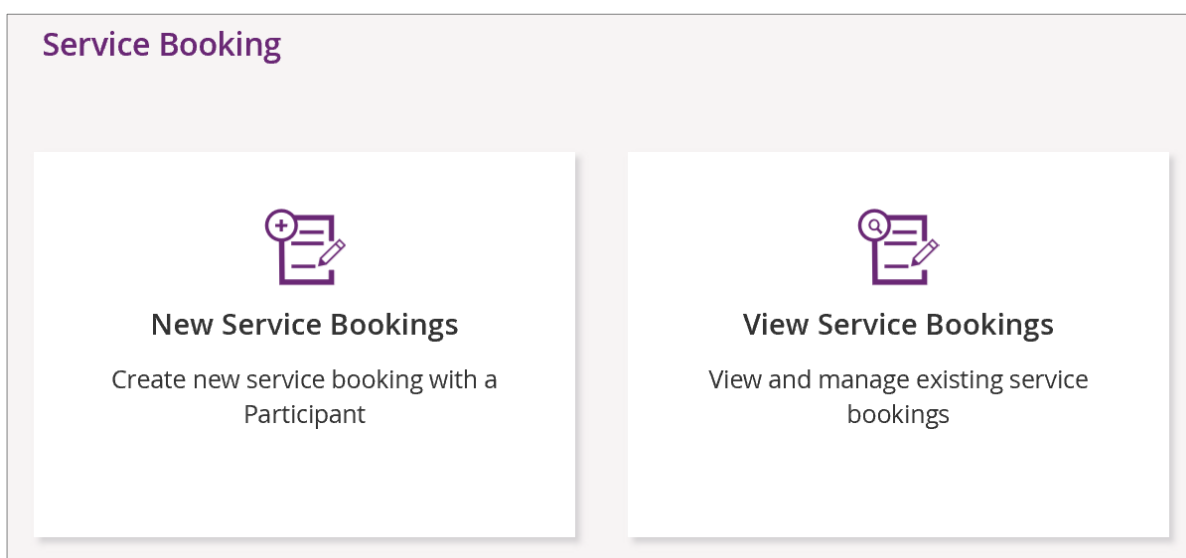
Important points to remember:

- 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.
- 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.

3. Select the **Service Booking** tile on the **myplace** home page.

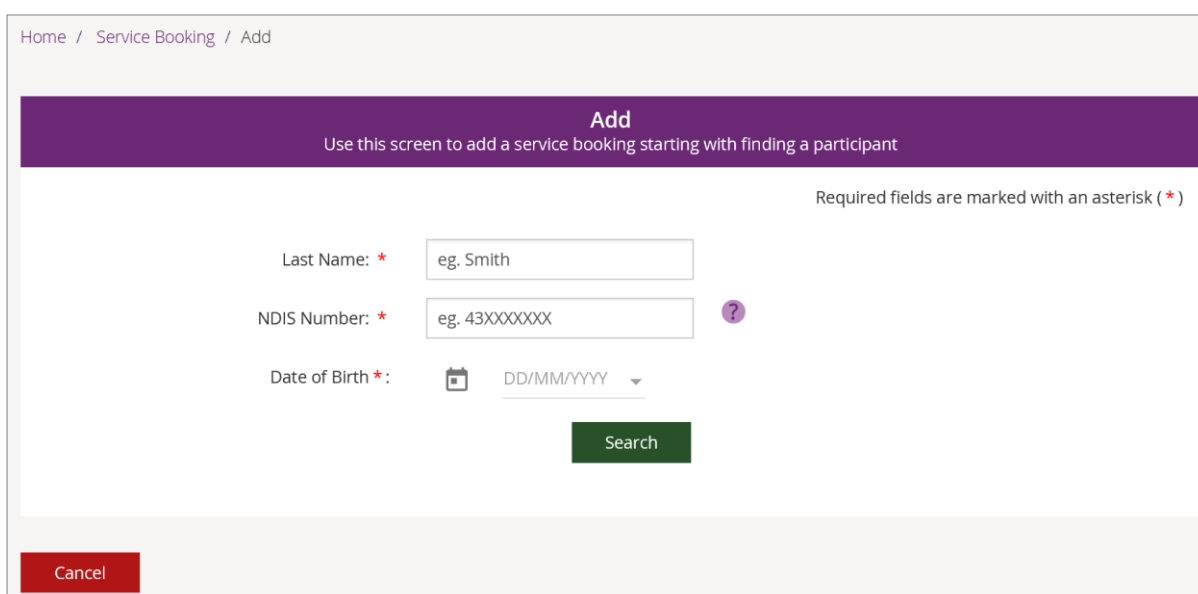


The **Service Booking** page displays.



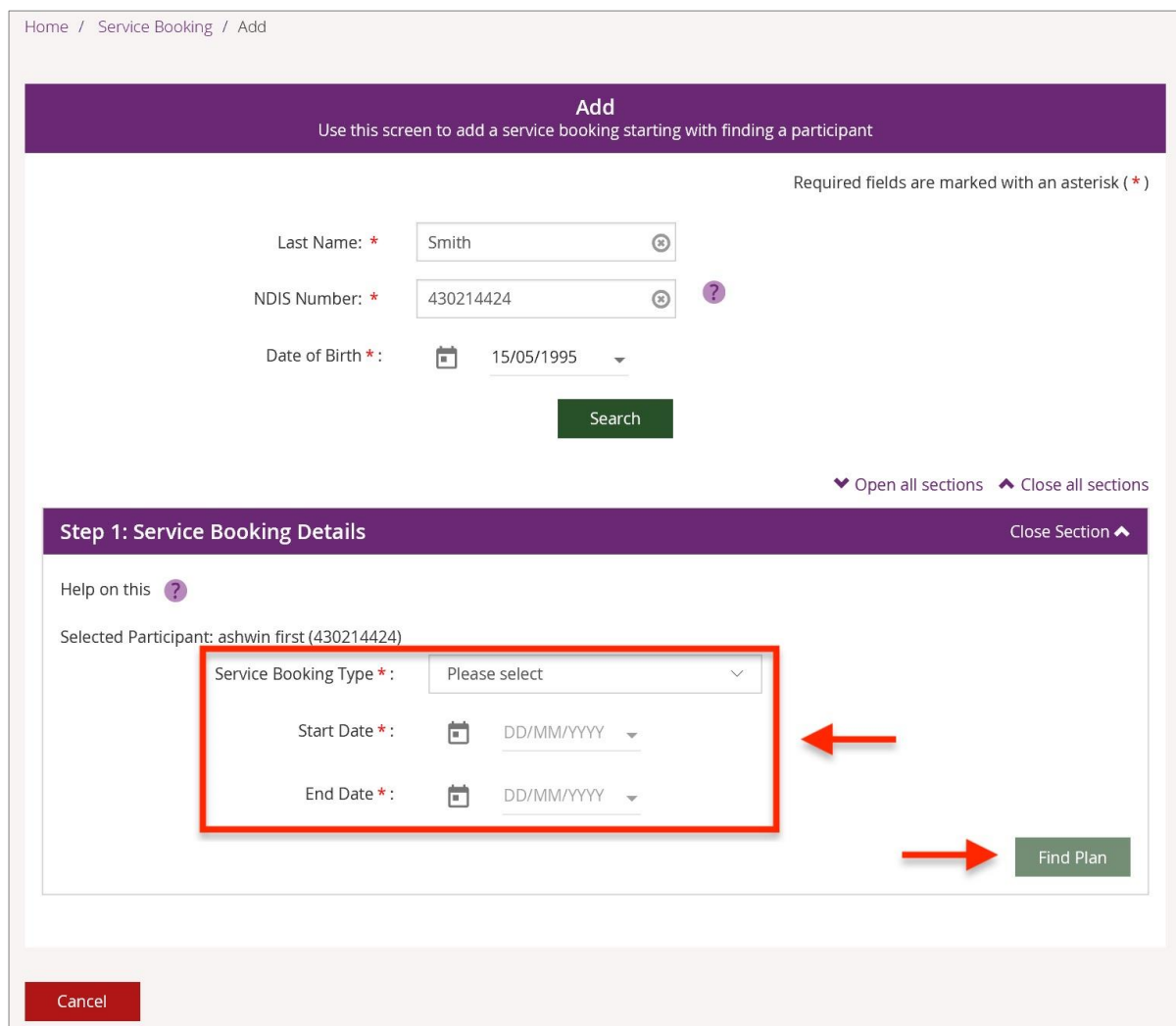
4. Select the **New Service Bookings** tile.

The **Add** service booking page opens.

The "Add" service booking page has a purple header with the title "Add" and the subtitle "Use this screen to add a service booking starting with finding a participant". Below the header, there is a note: "Required fields are marked with an asterisk (*)". The form contains three input fields: "Last Name: *" with a text box containing "eg. Smith", "NDIS Number: *" with a text box containing "eg. 43XXXXXXX" and a purple question mark icon, and "Date of Birth: *" with a calendar icon, a dropdown menu showing "DD/MM/YYYY", and a "Search" button. At the bottom left, there is a "Cancel" button.

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

The **Service Booking Details** section (Step 1) opens.



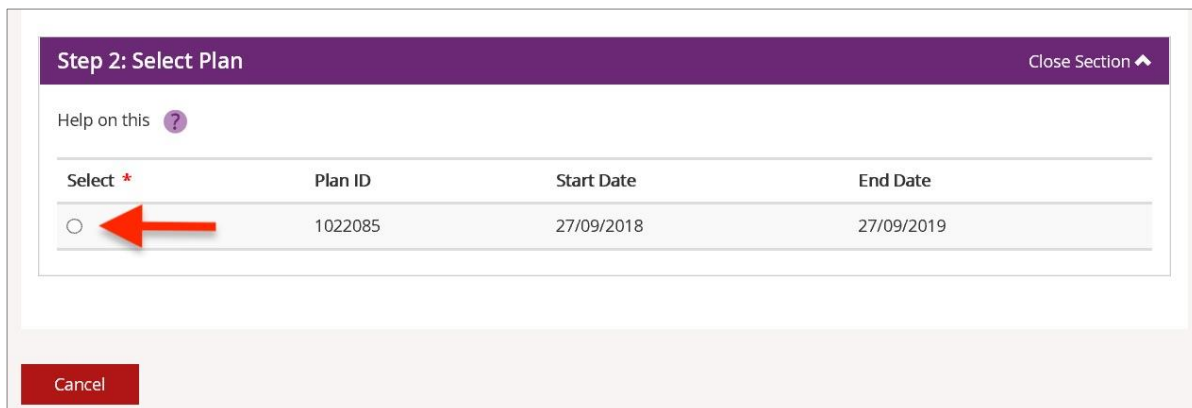
6. Select the **Service Booking Type**. The types available are:

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

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

8. Select **Find Plan**.

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

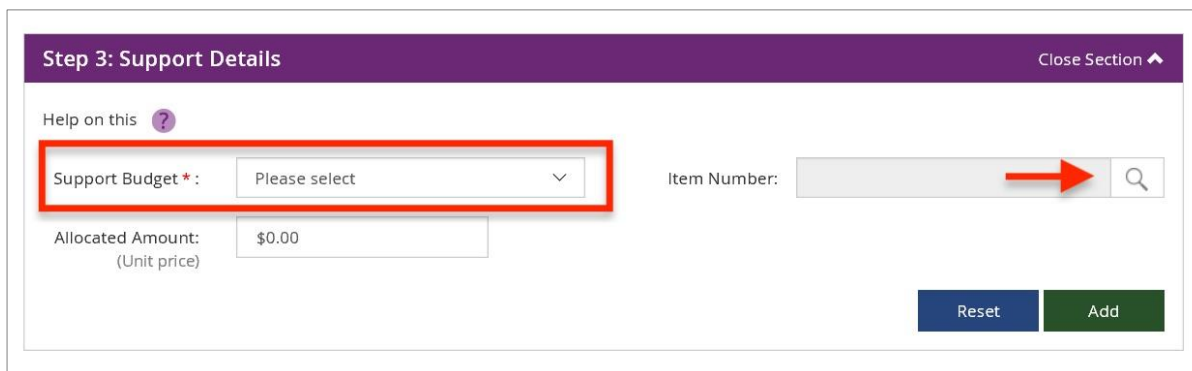


The screenshot shows the 'Step 2: Select Plan' section of the provider portal. It has a purple header bar with the title 'Step 2: Select Plan' and a 'Close Section' button with an upward arrow. Below the header is a 'Help on this' link with a question mark icon. The main content area contains a table with four columns: 'Select *', 'Plan ID', 'Start Date', and 'End Date'. There is one row in the table with the following values: an empty radio button, '1022085', '27/09/2018', and '27/09/2019'. A red arrow points to the radio button. At the bottom left of the section is a red 'Cancel' button.

Select *	Plan ID	Start Date	End Date
<input type="radio"/>	1022085	27/09/2018	27/09/2019

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

The **Support Details** section (Step 3) opens.



The screenshot shows the 'Step 3: Support Details' section of the provider portal. It has a purple header bar with the title 'Step 3: Support Details' and a 'Close Section' button with an upward arrow. Below the header is a 'Help on this' link with a question mark icon. The main content area contains a form with the following fields: 'Support Budget *:' with a dropdown menu showing 'Please select', 'Item Number:' with a text input field and a magnifying glass icon, and 'Allocated Amount: (Unit price)' with a text input field showing '\$0.00'. A red box highlights the 'Support Budget *:' dropdown. A red arrow points to the magnifying glass icon. At the bottom right of the section are two buttons: 'Reset' (blue) and 'Add' (green).

10. Select the support category using the dropdown button for **Support Budget**.

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

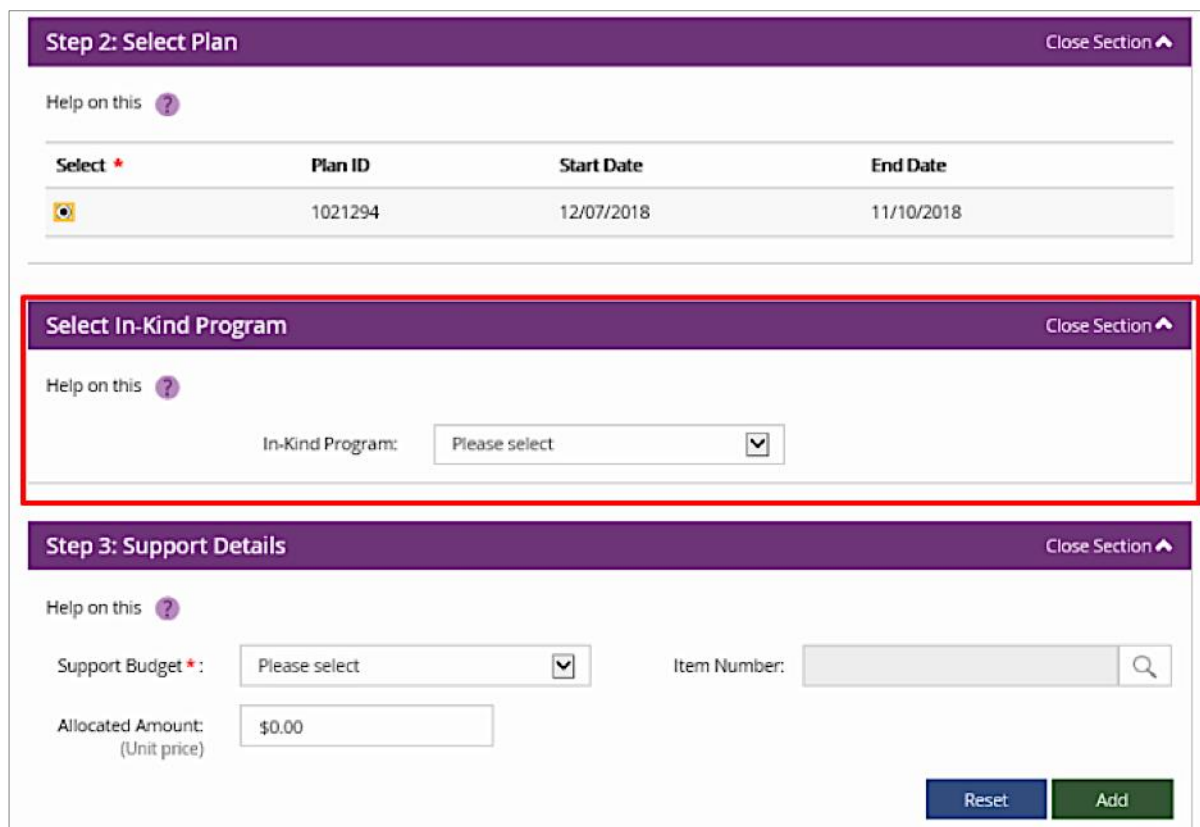
Note: The **Item Number** field (line item) is not mandatory unless the item is stated in the plan. Typically, an item is not stated but contact the participant to verify.

The list of support items opens.


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

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

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



The screenshot displays two sections of the NDIS provider portal. The top section, 'Step 2: Select Plan', features a table with columns for 'Select', 'Plan ID', 'Start Date', and 'End Date'. A single row is visible with Plan ID 1021294, Start Date 12/07/2018, and End Date 11/10/2018. Below this is a 'Select In-Kind Program' section, which is highlighted with a red border. It contains a dropdown menu labeled 'In-Kind Program:' with the text 'Please select'. The bottom section, 'Step 3: Support Details', includes fields for 'Support Budget' (a dropdown with 'Please select'), 'Item Number' (a text input with a search icon), and 'Allocated Amount: (Unit price)' (a text input with '\$0.00'). At the bottom right of this section are 'Reset' and 'Add' buttons.

Select *	Plan ID	Start Date	End Date
	1021294	12/07/2018	11/10/2018

Select In-Kind Program

In-Kind Program:

Step 3: Support Details

Support Budget *: Item Number:

Allocated Amount: (Unit price)

14. 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**.

Step 2: Select Plan

Close Section ^

Help on this ?

Select *	Plan ID	Start Date	End Date
<input checked="" type="radio"/>	1022085	27/09/2018	27/09/2019

Step 3: Support Details

Close Section ^

Help on this ?

Support Budget *:

Please select v

Item Number:

Q

Allocated Amount: (Unit price)

\$0.00

⊗

Reset

Add

Added Details

Close Section ^

Help on this ?

No.	Support Budget	Support Item Number	Support Item Name	Quantity	Allocated Amount (Unit Price)	Action
1	Assistive Technology	05_091203055_0103_1_2	Mobile Shower Commode - Child Transporter	1	\$400.00	Edit Remove

Next

Cancel

15. 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.

Step 3: Support Details

Close Section ^

Help on this ?

Support Budget * :

Please select

▼

Item Number:

Q

Allocated Amount:

\$0.00

⊗

(Unit price)

Reset

Add

Added Details

Close Section ^

Help on this ?

No.	Support Budget	Support Item Number	Support Item Name	Quantity	Allocated Amount (Unit Price)	Action
1	Assistive Technology	05_091203055_0103_1_2	Mobile Shower Commode - Child Transporter	1	\$400.00	<a>Edit <a>Remove

Next

Cancel

- Once you have selected **Next** to continue, the booking and item details display. To edit the details of the service booking, select **Back**.
- 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.

18. Ensure the service booking is as agreed with the participant, then tick the mandatory declaration and select **Submit**.

Home / Service Booking / Add

Add
 Use this screen to add a service booking starting with finding a participant

Support Booking Details

Participant name (NDIS Number)	Type	Start Date	End Date	Total Allocated Amount	In-Kind Program	Action
ashwin first (430214424)	Standard Booking	27/09/2018	27/09/2018	\$400.00	-	Edit

Support Details

No.	Support Budget	Support Item Number	Support Item Name	Quantity	Allocated Amount (Unit price)
1	Assistive Technology	05_091203055_0103_1_2	Mobile Shower Commode - Child Transporter	1	\$400.00

Comments:

* ☐ I declare that this Service Booking has been discussed with and agreed by the participant.

[Back](#) [Submit](#)

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

19. Select **View Service Bookings** to go directly to the **View Service Bookings** page, which is described in the steps below or select **myplace** logo to return to the home page.

Home / Service Booking / Add

Add
 Use this screen to add a service booking starting with finding a participant

✓

Your Service booking has been successfully submitted.


[View Service Bookings](#)

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.

Service Booking



New Service Bookings

Create new service booking with a Participant



View Service Bookings

View and manage existing service bookings

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

Home / Service Booking / Find

Find

View all your service bookings or search for a specific booking by participant's name NDIS number, status or booking number

View Service Booking-Help ?

Find a Participant

Enter participant name or NDIS number

Refine Search

Search

Booking Number

Please enter 8 digits

Status

All

Initiated By

All

Search Results

550 Results found

Sort By Service Booking Number

Service Booking Number	Service Booking Type	Participant Name (NDIS Number)	Start Date	End Date	Submitted Date	Service Booking Status	Initiated By
50015923	Standard Booking	ashwin first (430214424)	27/09/2018	27/09/2019	27/09/2018	Active	Staff
50015922	Standard Booking	ashwin first (430214424)	27/09/2018	30/11/2018	27/09/2018	Active	Provider

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.

Service Booking Status	Definition
Active	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.
Inactive	The service booking passed validation and was accepted by both participant and provider, but it has now expired (past the date of service delivery). It can have payment requests made against it if the date of service delivery falls within the original service booking dates.
Awaiting participant review	The participant needs to review the new service booking. Please note: If the participant does not have access to their myplace portal to review the service booking, you should contact the Agency.

Service Booking Status	Definition
Awaiting review	The provider needs to review the service booking and either accept or reject it (refer to Accept or reject a new service booking for further details).
Review change	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 Accept or reject a new service booking for further details).
Rejected	Either the participant or provider did not accept updates to the service booking. No payment requests can be made against it.
Change awaiting participant review	The participant needs to review the updated service booking. Please note: if the participant does not have access to their myplace portal to review the service booking, please contact the Agency.

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.

Home / Service Booking / Find

Find

View all your service bookings or search for a specific booking by participant's name NDIS number, status or booking number

View Service Booking-Help ?

Find a Participant ▼ Refine Search Search

Search Results

550 Results found

Sort By

Sort by:
Initiated By
Service Booking Number
Service Booking Start Date
Service Booking End Date
Submitted Date
Service Booking Status

Service Booking Number	Service Booking Type	Participant Name (NDIS Number)	Start Date	End Date	Submitted Date	Status	Initiated By
50015520	Standard Booking	Incident Manager (430212281)	02/05/2019	02/05/2019	31/08/2018	Rejected	Staff
50015706	Standard Booking	shimla sharam (430194438)	30/10/2018	30/11/2018	18/09/2018	Inactive	Provider
50015923	Standard Booking	ashwin first (430214424)	27/09/2018	27/09/2019	27/09/2018	Active	Staff
50015922	Standard Booking	ashwin first (430214424)	27/09/2018	30/11/2018	27/09/2018	Active	Provider

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

Home / Service Booking / Find

Find

View all your service bookings or search for a specific booking by participant's name NDIS number, status or booking number

View Service Booking-Help ?

Find a Participant ▼ Refine Search Search

Search Results

550 Results found

Sort By Service Booking Number ▼

Service Booking Number	Service Booking Type	Participant Name (NDIS Number)	Start Date	End Date	Submitted Date	Service Booking Status	Initiated By
50015923	Standard Booking	ashwin first (430214424)	27/09/2018	27/09/2019	27/09/2018	Active	Staff
50015922	Standard Booking	ashwin first (430214424)	27/09/2018	30/11/2018	27/09/2018	Active	Provider

The details of the service booking display.

6. Select **Back** to return to the previous page.

Home / Service Bookings / Find / View

View Service Booking Details

Detailed view of the selected service booking

Service Booking Details

Participant Name (NDIS Number)	Type	Number	Start Date	End Date	Revised End Date	Total	In-Kind Program	Status
Incident Manager (430212281)	Standard Booking	50015520	02/05/2019	02/05/2019	-	\$0.00	-	Rejected

Support Details

No.	Support Budget	Support Item Number	Support Item Name	Quantity	Allocated Amount (Unit Price)	Remaining Amount
1	CB Choice & Control	14_034_0127_8_3	Plan Management – Financial Administration	1	\$0.00	\$0.00

[Back](#)

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.

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

Home / Service Booking / Find

Find

View all your service bookings or search for a specific booking by participant's name NDIS number, status or booking number

View Service Booking-Help ?

Find a Participant ▼ Refine Search Search

Search Results

550 Results found Sort By Service Booking Number ▼

Service Booking Number	Service Booking Type	Participant Name (NDIS Number)	Start Date	End Date	Submitted Date	Service Booking Status	Initiated By
50015923	Standard Booking	ashwin first (430214424)	27/09/2018	27/09/2019	27/09/2018	Active	Staff
50015922	Standard Booking	ashwin first (430214424)	27/09/2018	30/11/2018	27/09/2018	Active	Provider

2. Click on the **Status** dropdown and select 'Awaiting Review'; then click the **Search** button to display new service bookings awaiting review.

Home / Service Booking / Find

Find

View all your service bookings or search for a specific booking by participant's name NDIS number, status or booking number

View Service Booking-Help ?

Find a Participant ▲ Refine Search Search

Booking Number Status

Initiated By ▼

All

Active/Inactive

Awaiting Review

Awaiting Participant Review

Change Awaiting Participant

Review Change

Rejected

Search Results

10 Results found Sort By Service Booking Number ▼

Service Booking Number	Service Booking Type	Participant Name (NDIS Number)	Start Date	End Date	Submitted Date	Service Booking Status	Initiated By
50014710	Standard Booking	JEAN JEANIE 001 (430213724)	27/07/2018	31/08/2018	27/07/2018	Awaiting Review	Participant
50014708	Standard Booking	JEAN JEANIE 001 (430213724)	27/07/2018	31/08/2018	27/07/2018	Awaiting Review	Participant

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

Home / Service Bookings / Find / View

View Service Booking Details

Detailed view of the selected service booking


Service Booking Details

Participant Name (NDIS Number)	Type	Number	Start Date	End Date	Revised End Date	Total	In-Kind Program	Status
JEAN JEANIE 001 (430213724)	Standard Booking	50014710	27/07/2018	31/08/2018	-	\$500.00	-	Awaiting Review

Support Details

No.	Support Budget	Support Item Number	Support Item Name	Quantity	Revised Quantity	Allocated Amount (Unit Price)	Revised Allocated Amount (Unit Price)	Revised Amount	Remaining Amount
1	Support Coordination	-	-	1	-	\$500.00	-	-	\$500.00

Record Review Decision



Please review the newly created service booking details as displayed above. If you choose to Approve, this service booking, it will come into effect from the Start date.

Decision * :

Please select

Back

Submit

- 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**.

Home / Service Bookings / Find / View

View Service Booking Details

Detailed view of the selected service booking


Service Booking Details

Participant Name (NDIS Number)	Type	Number	Start Date	End Date	Revised End Date	Total	In-Kind Program	Status
JEAN JEANIE 001 (430213724)	Standard Booking	50014710	27/07/2018	31/08/2018	-	\$500.00	-	Awaiting Review

Support Details

No.	Support Budget	Support Item Number	Support Item Name	Quantity	Revised Quantity	Allocated Amount (Unit Price)	Revised Allocated Amount (Unit Price)	Revised Amount	Remaining Amount
1	Support Coordination	-	-	1	-	\$500.00	-	-	\$500.00

Record Review Decision


 Please review the newly created service booking details as displayed above. If you choose to Approve, this service booking, it will come into effect from the Start date.

Decision * :

Please select

Accept

Reject



[Back](#) [Submit](#)

- If you decide to reject the service booking, select a **Reason for Rejection** and select **Submit**.

Home / Service Bookings / Find / View

View Service Booking Details

Detailed view of the selected service booking


Service Booking Details

Participant Name (NDIS Number)	Type	Number	Start Date	End Date	Revised End Date	Total	In-Kind Program	Status
COLIN COYOTE 001 (430213805)	Standard Booking	50014747	28/07/2018	30/09/2018	-	\$500.00	-	Awaiting Review

Support Details

No.	Support Budget	Support Item Number	Support Item Name	Quantity	Revised Quantity	Allocated Amount (Unit Price)	Revised Allocated Amount (Unit Price)	Revised Amount	Remaining Amount
1	CB Social, Community, Civic	-	-	1	-	\$500.00	-	-	\$500.00



Record Review Decision


 Please review the newly created service booking details as displayed above. If you choose to Approve, this service booking, it will come into effect from the Start date.

Decision *:

Reason for Rejection *:

- Change is not acceptable per agreement
- No capacity to fulfil
- Not enough funding committed
- Other
- Service not available



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.

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

Home / Service Booking / Find

Find
View all your service bookings or search for a specific booking by participant's name NDIS number, status or booking number

View Service Booking-Help ?

Find a Participant **▼ Refine Search** **Search**

Search Results

550 Results found Sort By

Service Booking Number	Service Booking Type	Participant Name (NDIS Number)	Start Date	End Date	Submitted Date	Service Booking Status	Initiated By
50015923	Standard Booking	ashwin first (430214424)	27/09/2018	27/09/2019	27/09/2018	Active	Staff
50015922	Standard Booking	ashwin first (430214424)	27/09/2018	30/11/2018	27/09/2018	Active	Provider

2. Click on the **Status** dropdown and select 'Review Change'; then click the **Search** button to display new service bookings requiring review.

Home / Service Booking / Find

Find

View all your service bookings or search for a specific booking by participant's name NDIS number, status or booking number

View Service Booking-Help ?

Find a Participant

Booking Number Status

Initiated By

Search

Search

All

Active/Inactive

Awaiting Review

Awaiting Participant Review

Change Awaiting Participant

Review Change

Rejected

Search Results

2 Results found

Sort By

Service Booking Number	Service Booking Type	Participant Name (NDIS Number)	Start Date	End Date	Submitted Date	Service Booking Status	Initiated By
50015787	Standard Booking	vikas test74 (430214379)	21/09/2018	30/12/2018	21/09/2018	Review Change	Provider
50014744	Standard Booking	COLIN COYOTE 001 (430213805)	28/07/2018	31/07/2018	28/07/2018	Review Change	Participant

First Prev Page 1 of 1 Next Last

Back

3. Select a **Service Booking Number** to view details of that booking. The revised end date, quantity and amount are shown.

4. Review the changes and decide whether to accept or reject the change.

Home / Service Bookings / Find / View

View Service Booking Details

Detailed view of the selected service booking


Service Booking Details

Participant Name (NDIS Number)	Type	Number	Start Date	End Date	Revised End Date	Total	In-Kind Program	Status
JOHN SMITH AGENCY 001 (430209877)	Standard Booking	50015811	24/09/2018	13/10/2018	-	\$100.00	-	Review Change

Support Details

No.	Support Budget	Support Item Number	Support Item Name	Quantity	Revised Quantity	Allocated Amount (Unit Price)	Revised Allocated Amount (Unit Price)	Revised Amount	Remaining Amount
1	Daily Activities	01_003_0107_1_1	Assistance From Live-In Carer	5	5	\$20.00	\$19.75	\$98.75	\$100.00

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.

Decision *:

Please select
Accept
Reject

Back

Submit

- If you decide to accept the changes to the service booking, select **Accept** and select **Submit**.

Home / Service Bookings / Find / View

View Service Booking Details

Detailed view of the selected service booking


Service Booking Details

Participant Name (NDIS Number)	Type	Number	Start Date	End Date	Revised End Date	Total	In-Kind Program	Status
JOHN SMITH AGENCY 001 (430209877)	Standard Booking	50015811	24/09/2018	13/10/2018	-	\$100.00	-	Review Change

Support Details

No.	Support Budget	Support Item Number	Support Item Name	Quantity	Revised Quantity	Allocated Amount (Unit Price)	Revised Allocated Amount (Unit Price)	Revised Amount	Remaining Amount
1	Daily Activities	01_003_0107_1_1	Assistance From Live-In Carer	5	5	\$20.00	\$19.75	\$98.75	\$100.00

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.

Decision *: Accept

Back
Submit

- If you decide to reject the changes to service booking, select a **Reason for Rejection** and select **Submit**.

Home / Service Bookings / Find / View

View Service Booking Details

Detailed view of the selected service booking


Service Booking Details

Participant Name (NDIS Number)	Type	Number	Start Date	End Date	Revised End Date	Total	In-Kind Program	Status
JOHN SMITH AGENCY 001 (430209877)	Standard Booking	50015811	24/09/2018	13/10/2018	-	\$100.00	-	Review Change

Support Details

No.	Support Budget	Support Item Number	Support Item Name	Quantity	Revised Quantity	Allocated Amount (Unit Price)	Revised Allocated Amount (Unit Price)	Revised Amount	Remaining Amount
1	Daily Activities	01_003_0107_1_1	Assistance From Live-In Carer	5	5	\$20.00	\$19.75	\$98.75	\$100.00

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.

Decision * :

Reject

Reason for Rejection * :

Change is not acceptable per agreement

No capacity to fulfil

Not enough funding committed

Other

Service not available

Back

Submit

- If you select **Other** as the reason, you will need to provide a **Rejection Explanation** and select **Submit**.

Home / Service Bookings / Find / View

View Service Booking Details

Detailed view of the selected service booking

Service Booking Details

Participant Name (NDIS Number)	Type	Number	Start Date	End Date	Revised End Date	Total	In-Kind Program	Status
JOHN SMITH AGENCY 001 (430209877)	Standard Booking	50015811	24/09/2018	13/10/2018	-	\$100.00	-	Review Change

Support Details

No.	Support Budget	Support Item Number	Support Item Name	Quantity	Revised Quantity	Allocated Amount (Unit Price)	Revised Allocated Amount (Unit Price)	Revised Amount	Remaining Amount
1	Daily Activities	01_003_0107_1_1	Assistance From Live-In Carer	5	5	\$20.00	\$19.75	\$98.75	\$100.00

Record Review Decision

i Before proceeding with providing a decision please review the Revised Amount, Revised Quantity or the Revised End date columns as displayed above.

Decision *:

Reason for Rejection *:

Rejection Explanation *:

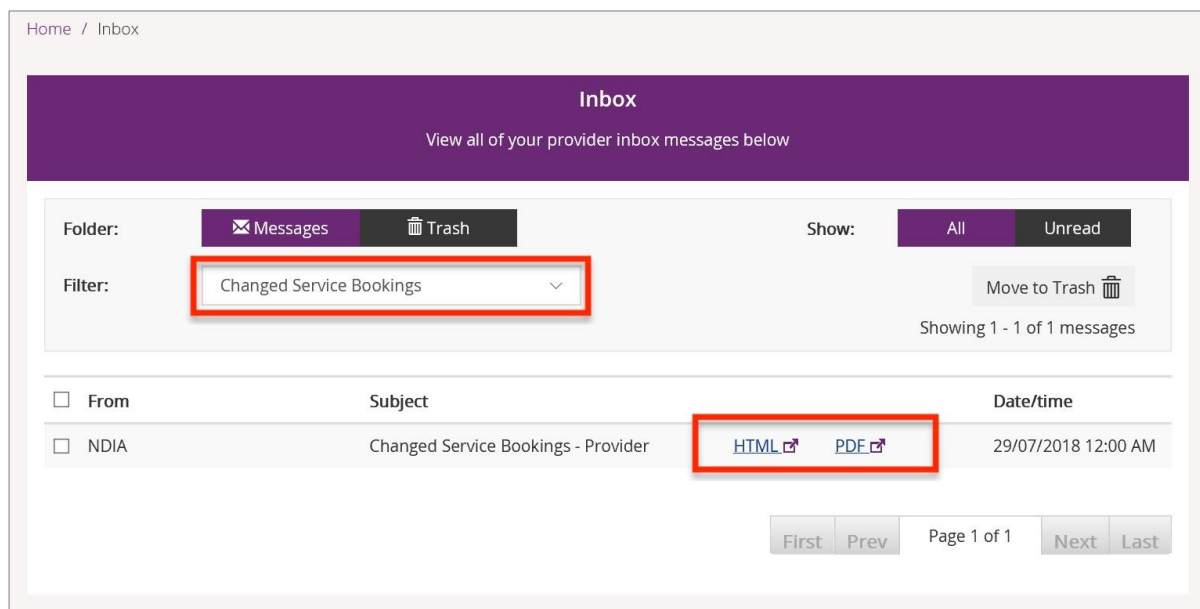
255 Characters Remaining

Note that explanations will be sent to the participant and may be monitored

[Back](#) [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 screenshot shows the 'Inbox' section of the NDIS provider portal. At the top, there's a purple header with 'Inbox' and 'View all of your provider inbox messages below'. Below this, there are filters for 'Folder' (Messages, Trash) and 'Show' (All, Unread). A 'Filter' dropdown is set to 'Changed Service Bookings'. A 'Move to Trash' button is visible. The message list shows one message from 'NDIA' with the subject 'Changed Service Bookings - Provider'. The message has two links, 'HTML' and 'PDF', which are highlighted with a red box. The date/time is '29/07/2018 12:00 AM'. At the bottom, there are navigation buttons: 'First', 'Prev', 'Page 1 of 1', 'Next', and 'Last'.

The notification summary of all service booking changes for all participants will be displayed:

If not delivered: GPO Box 700 Canberra ACT 2601



NDS2LETTERZQ00029138

Reference: **4050003397**

GPO Box 700
CANBERRA ACT 2601
1800 800 110
ndis.gov.au

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.

Home / Service Bookings / Find / View / Update Allocation

Update Allocation

Edit the current quantity and allocated amount

Service Booking Details

Participant Name (NDIS Number)	Type	Number	Start Date	End Date	Revised End Date	Total	In-Kind Program	Status
CONNIE COMPLIANCE 001 (430214440)	Standard Booking	50015952	28/09/2018	31/12/2018	-	\$50.00	-	Active

Support Details

No.	Support Budget	Support Item Number	Support Item Name	Quantity	Allocated Amount (Unit Price)	Remaining Amount
1	Consumables	03_050903053_0103_1_1	Incontinence Alarms	<input type="text" value="1"/>	<input type="text" value="\$50.00"/>	\$50.00

* ☐ I declare that this Service Booking has been discussed with and agreed by the participant.

Back

Submit

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.

 - 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**.

Home / Service Bookings / Find / View / Update End date

Update Service Booking End Date

Service Booking Details

Participant Name (NDIS Number)	Service Booking Type	Service Booking Number	Start Date	Current End Date	Total Allocated Amount	Total Remaining Amount	Status
CONNIE COMPLIANCE 001 (430214440)	Standard Booking	50015952	28/09/2018	31/12/2018	\$50.00	\$50.00	Active

Update End Date

Service Booking End Date *: Reason for Change *:

No.	Support Budget	Support Item Number	Support Item Name	Quantity	Allocated Amount	Remaining Amount	Accrual for Pending Payment Requests
1	Consumables	03_050903053_0103_1_1	Incontinence Alarms	1	\$50.00	\$50.00	<input type="text"/>

☐ I declare that this Service Booking has been discussed with and agreed by the participant.

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

5. Select **Yes**.

Home / Service Bookings / Find / View / Update End date

Update Service Booking End Date

Service Booking Details

Participant Name (NDIS Number)	Service Booking Type	Service Booking Number	Start Date	Current End Date	Total Allocated Amount	Total Remaining Amount	Status
CONNIE COMPLIANCE 001 (430214440)	Standard Booking	50015952	28/09/2018	31/12/2018	\$50.00	\$50.00	Active

Following this update, Quantity, Allocated Amount (unit price) and End Date for this service booking cannot be changed again. You will not be able to provide supports through this service booking after 29/09/2018. Do you want to continue?

No.	Support Budget	Support Item Number	Support Item Name	Quantity	Allocated Amount	Remaining Amount	Accrual for Pending Payment Requests
1	Consumables	03_050903053_0103_1_1	Incontinence Alarms	1	\$50.00	\$50.00	\$400.00

☒ I declare that this Service Booking has been discussed with and agreed by the participant.

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.

Home / Service Bookings / Find / View

View Service Booking Details

Detailed view of the selected service booking

Service Booking Details

Participant Name (NDIS Number)	Type	Number	Start Date	End Date	Revised End Date	Total	In-Kind Program	Status
CONNIE COMPLIANCE 001 (430214440)	Standard Booking	50015952	28/09/2018	31/12/2018	-	\$50.00	-	Active

Support Details

No.	Support Budget	Support Item Number	Support Item Name	Quantity	Allocated Amount (Unit Price)	Remaining Amount
1	Consumables	03_050903053_0103_1_1	Incontinence Alarms	1	\$50.00	\$50.00

Back Delete Update Allocation Update End date

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**.

Home / Service Bookings / Find / View

View Service Booking Details

Detailed view of the selected service booking

Service Booking Details

Participant Name (NDIS)	Type	Number	Start Date	End Date	Revised	Total	In Kind Program	Status
CONNIE COMPLIANCE (430214441)	Standard Booking	50015952	28/09/2018	28/09/2019				Active

Warning:

You are about to delete this service booking. This will remove it from your list of service bookings permanently. You will not be able to provide services or request payment on this service booking. Do you agree to continue? Choose yes to delete or no to cancel this action.


NO YES

Support Items

No.	Support Budget	Support Item Number	Support Item Name	Quantity	Allocated Amount (Unit Price)	Remaining Amount
1	Consumables	03_050903053_0103_1_1	Incontinence Alarms	1	\$50.00	\$50.00

Back Delete Update Allocation Update End date

An information message confirms that the service booking has been deleted.



Service booking 50015952 has been deleted.

Home / Service Booking / Find

Find

View all your service bookings or search for a specific booking by participant's name NDIS number, status or booking number

View Service Booking-Help ?

Find a Participant ▼ Refine Search Search

Search Results

562 Results found Sort By Service Booking Number ▼

Service Booking Number	Service Booking Type	Participant Name (NDIS Number)	Start Date	End Date	Submitted Date	Service Booking Status	Initiated By
50015962	Standard Booking	CONNIE COMPLIANCE 002 (430214441)	28/09/2018	28/09/2019	28/09/2018	Active	Staff
50015961	Standard Booking	CONNIE COMPLIANCE 002 (430214441)	28/09/2018	28/09/2019	28/09/2018	Active	Staff

Payment request

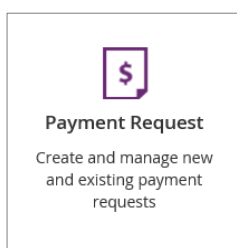
Payment requests were previously known as claims. In this tile you can create and submit payment requests to NDIS. You can also go here to view a history of submitted payment requests.



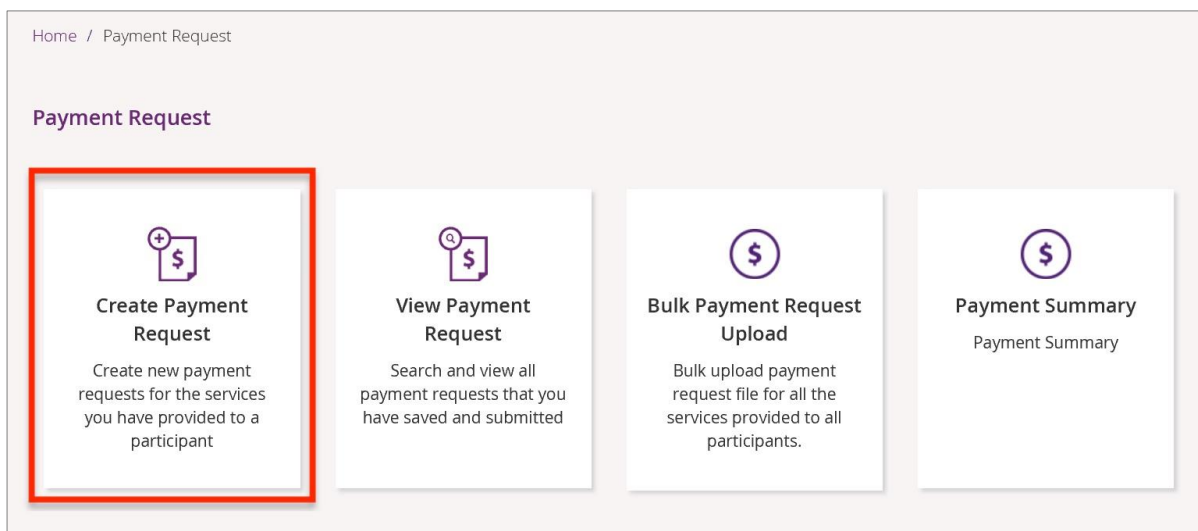
You will need to have provided your bank account details to NDIS before a payment request can be created. Usually, you would have recorded your bank account details in the **myplace** portal after registering with NDIS (please see **Bank Account Details** section).

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.

Home / Payment Request / Search

Search Participant

Please search by First Name and Last Name or NDIS Number.

Search by: *

Please select

Name

NDIS Number

Required fields are marked with an asterisk (*)

Search

Cancel

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 participants new NDIS number or the old Siebel NDIS number.

Home / Payment Request / Search

Search Participant

Please search by First Name and Last Name or NDIS Number.

Search by: *

NDIS Number

NDIS Number: *

eg. 43XXXXXXX

 ?

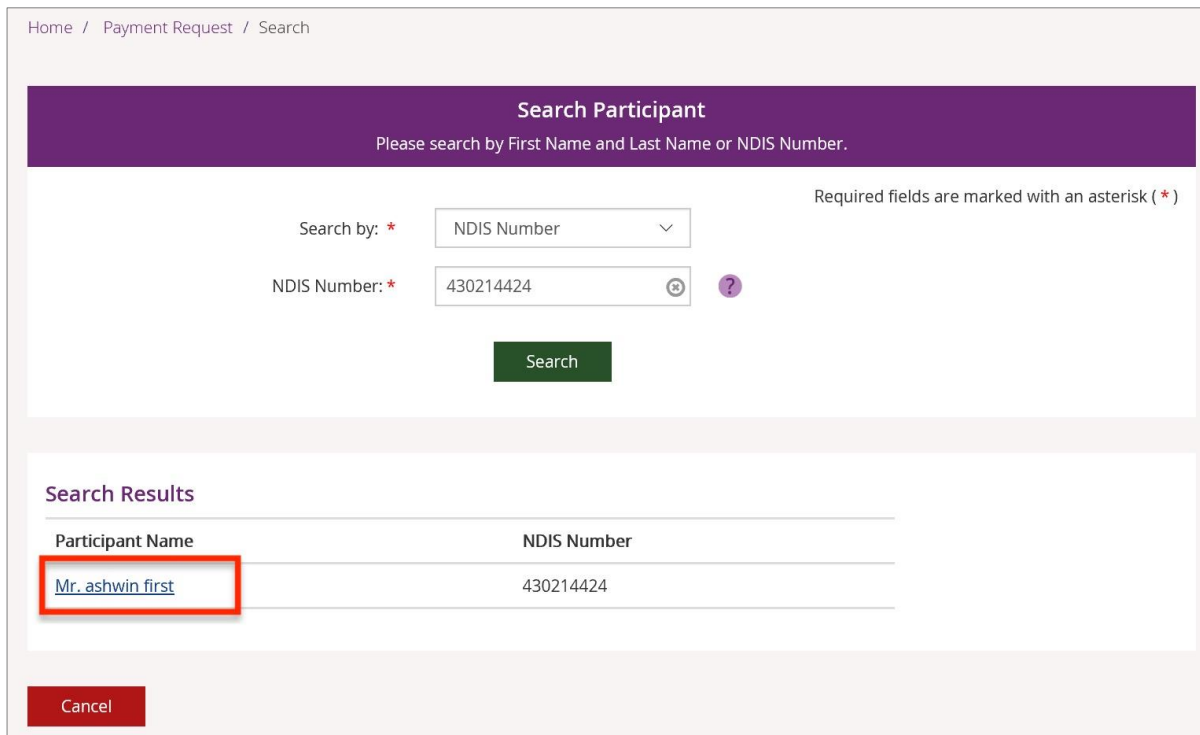
Required fields are marked with an asterisk (*)

Search

Cancel

The **Search Results** display.

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




Home / Payment Request / Search

Search Participant

Please search by First Name and Last Name or NDIS Number.

Required fields are marked with an asterisk (*)

Search by: *

NDIS Number: * 

Search Results

Participant Name	NDIS Number
Mr. ashwin first	430214424

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.

Home / Payment Request / Search / New Payment Request

New Payment Request

Submit a new payment request for a support you have recently provided.

Participant Details

Participant Name:	Mr. ashwin first
NDIS Number:	430214424

Payment Request Details

New Payment Request - Help ? Required fields are marked with an asterisk (*)

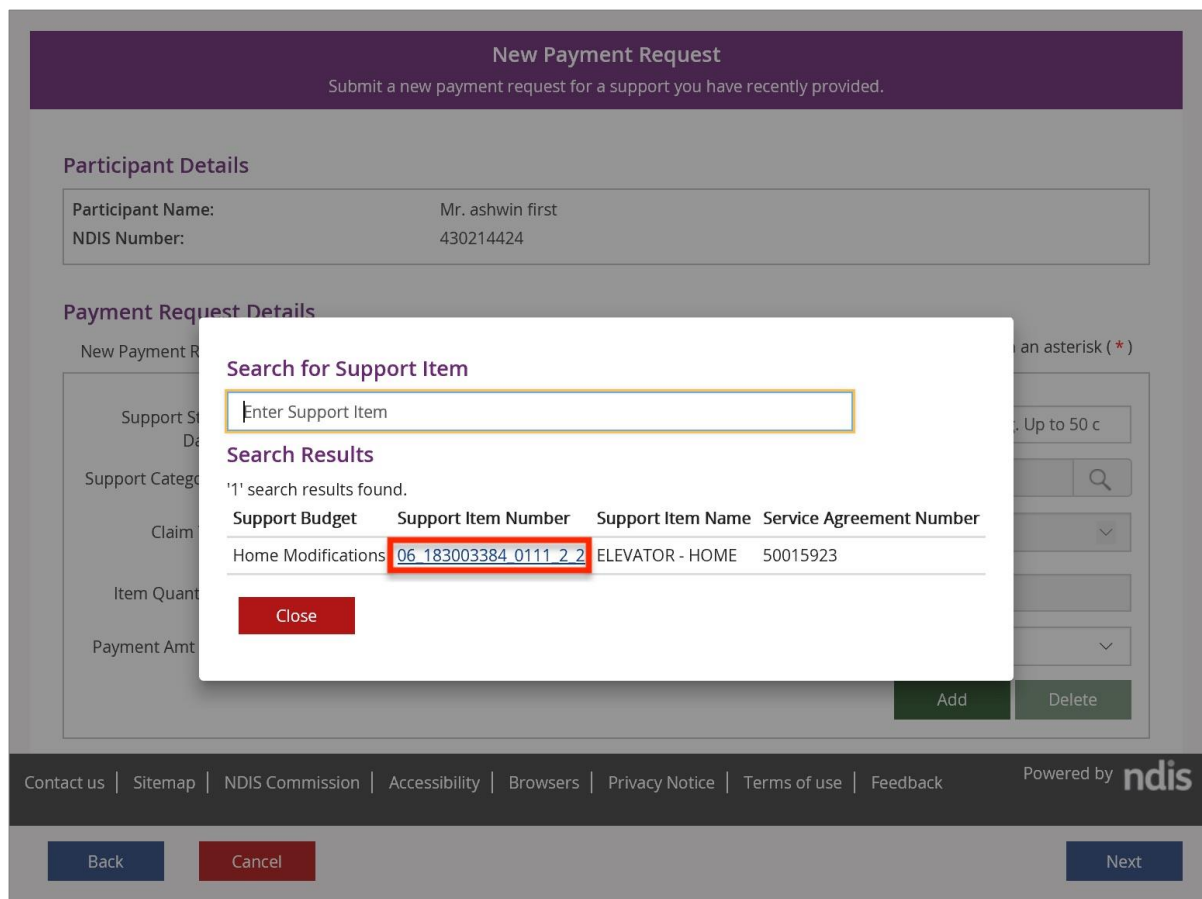
Support Start Date: *	<input type="text" value="DD/MM/YYYY"/>	Support End Date: *	<input type="text" value="DD/MM/YYYY"/>	Invoice Number: *	<input type="text" value="eg. Up to 50 c"/>
Support Category: *	<input type="text"/>	Item Number: *	<input type="text"/>		
Claim Type:	<input type="text"/>	Cancellation Reason:	<input type="text"/>		
Item Quantity: *	<input type="text" value="eg. 0"/>	Unit of Measure:	<input type="text"/>		
Payment Amt (\$): *	<input type="text" value="eg. 0.00"/>	GST:	<input type="text" value="GST Free"/>		

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.



New Payment Request
Submit a new payment request for a support you have recently provided.

Participant Details

Participant Name: Mr. ashwin first
NDIS Number: 430214424

Payment Request Details

New Payment Request

Support Item Number: [Search for Support Item]

Search Results

1 search results found.

Support Budget	Support Item Number	Support Item Name	Service Agreement Number
Home Modifications	06 183003384 0111 2 2	ELEVATOR - HOME	50015923

Close

Add Delete

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Powered by ndis

Back Cancel Next

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 travel, cancellation or report writing. For all other claim types, the default value is standard.
12. If the **Claim Type** selected is cancellation, then a **Cancellation Reason** will be required from a list for the most appropriate reason.
13. If you need to add more items for this participant, select **Add** to enter them. Select **Next** to continue to the next stage.

Home / Payment Request / Search / New Payment Request

New Payment Request
 Submit a new payment request for a support you have recently provided.

Participant Details

Participant Name:	Mr. ashwin first
NDIS Number:	430214424

Payment Request Details

New Payment Request - Help ? Required fields are marked with an asterisk (*)

Support Start * Date:		27/09/2018	Support End Date: *		27/09/2018	Invoice Number: *	eg. Up to 50 c
Support Category: *		Home Modifications	Item Number: *				
Claim Type:		Standard	Cancellation Reason:				
Item Quantity: *		eg. 0	Unit of Measure:				
Payment Amt (\$): *		eg. 0.00	GST:		GST Free		
						<div style="display: inline-block; margin-left: 10px;"> <div style="background-color: #2e5496; color: white; padding: 5px 10px; border: 1px solid #000;">Add</div> <div style="background-color: #800000; color: white; padding: 5px 10px; border: 1px solid #000; margin-left: 5px;">Delete</div> </div>	

Support Start * Date:		DD/MM/YYYY	Support End Date: *		DD/MM/YYYY	Invoice Number: *	eg. Up to 50 c
Support Category: *			Item Number: *				
Claim Type:			Cancellation Reason:				
Item Quantity: *		eg. 0	Unit of Measure:				
Payment Amt (\$): *		eg. 0.00	GST:		GST Free		
						<div style="display: inline-block; margin-left: 10px;"> <div style="background-color: #2e5496; color: white; padding: 5px 10px; border: 1px solid #000;">Add</div> <div style="background-color: #800000; color: white; padding: 5px 10px; border: 1px solid #000; margin-left: 5px;">Delete</div> </div>	

Back

Cancel

Next

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, select **Submit**.
- 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**.

[Home](#) / [Payment Request](#) / [Search](#) / [New Payment Request](#) / [Review Payment Request](#)

Review Payment Request

Submit a new payment request for a support you have recently provided.

Participant Details

Participant Name: Mr. ashwin first
NDIS Number: 430214424

Payment Details

#	Start date of support	End date of support	Support Budget	Support Item Number	Claim Type	Cancellation Reason	Item Quantity	Unit of Measure	Payment Amount	GST	Invoice Number
1	27/09/2018	27/09/2018	Consumables	03_050903053_0103_1_1	Standard		1	each	\$100.00	GST Free	1234567890098765432

Payment Request Amount Summary

Support Category	Total Claim Amount
Consumables	\$100.00
Grand Total	\$100.00

[Back](#)

[Cancel](#)

[Submit](#)

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

[Home](#) / [Payment Request](#) / [Search](#) / [New Payment Request](#) / [Review Payment Request](#) / [Confirmation](#)

Confirmation

Submit a new payment request for a support you have recently provided.



Your Payment Requests have been received.

Claim Details

Payment Request #	Support Category	Item Number	Claim Type	Cancellation Reason	Payment Amount	GST	Status	Reject Reason
1 10125330	Consumables	03_050903053_0103_1_1	Standard		\$100.00	GST Free	Pending Payment	

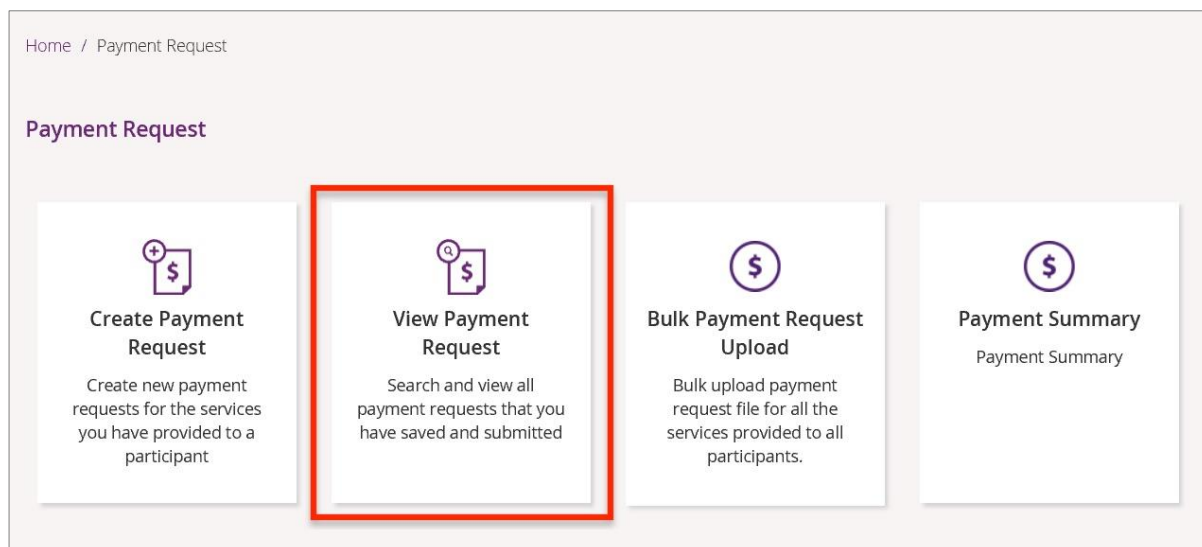
[View Payment Requests](#)

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.




Home / Payment Request

Payment Request




Create Payment Request

Create new payment requests for the services you have provided to a participant




View Payment Request

Search and view all payment requests that you have saved and submitted



Bulk Payment Request Upload

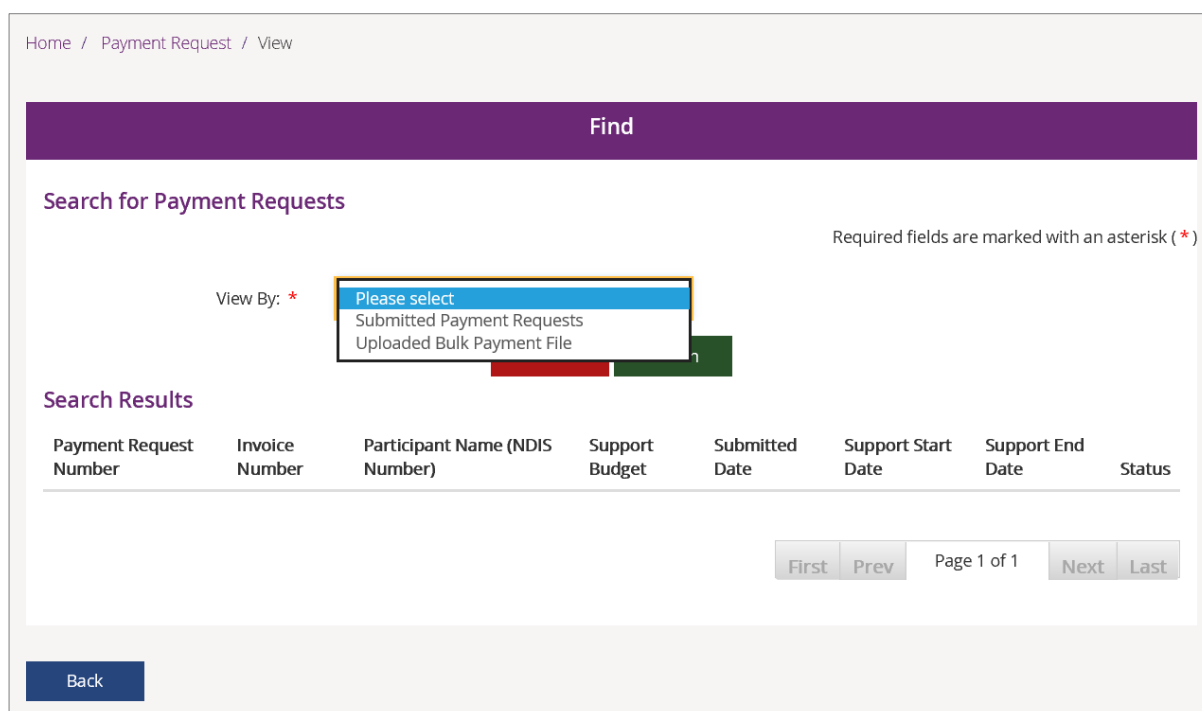
Bulk upload payment request file for all the services provided to all participants.



Payment Summary

Payment Summary

2. At **View By**, select **Submitted Payments Request** from the dropdown list.



Home / Payment Request / View

Find

Search for Payment Requests

Required fields are marked with an asterisk (*)

View By: *

Please select

Submitted Payment Requests

Uploaded Bulk Payment File

Search Results

Payment Request Number	Invoice Number	Participant Name (NDIS Number)	Support Budget	Submitted Date	Support Start Date	Support End Date	Status
------------------------	----------------	--------------------------------	----------------	----------------	--------------------	------------------	--------

First Prev Page 1 of 1 Next Last

Back

3. Select the **Search by** drop down and select the desired search criterion.

Home / Payment Request / View

Find

Search for Payment Requests

Required fields are marked with an asterisk (*)

View By: *

Submitted Payment Requests

Search by: *

Please select

NDIS Number

Payment Request Number

Status

Support Item Number

Submitted Date

Support Start Date

Support End Date

Your Invoice Number

Search Results

Payment Request Number	Invoice Number	Submitted Date	Support Start Date	Support End Date	Status
------------------------	----------------	----------------	--------------------	------------------	--------

First

Prev

Page 1 of 1

Next

Last

Back

4. Enter your search criterion and select **Add to Criteria**. You can add multiple search criteria.

Home / Payment Request / View

Find

Search for Payment Requests

Required fields are marked with an asterisk (*)

View By: * Submitted Payment Requests

Search by: * Status

Search Criteria: *

Please select
Rejected
Incomplete
Pending Payment
Paid
Cancelled
Awaiting Approval

Add to Criteria

Search Results

Payment Request Number	Invoice Number	Participant Name (NDIS Number)	Support Budget	Submitted Date	Support Start Date	Support End Date	Status
10125327	12009	ashwin first (430214424)	Consumables	28/09/2018	28/09/2018	28/09/2018	Pending Payment
10092831	12345	GRAGRA NORRIS (430210496)	Daily Activities	04/05/2018	01/05/2018	04/05/2018	Pending Payment

First Prev Page 1 of 1 Next Last

Back

- 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.
- Once you have entered all your criteria, select **Search**. Your search results display.
- Select the **Payment Request Number** to open details of that payment request.

Search Results

2 Results found

Payment Request Number	Invoice Number	Participant Name (NDIS Number)	Support Budget	Submitted Date	Support Start Date	Support End Date	Status
10125327	12009	ashwin first (430214424)	Consumables	28/09/2018	28/09/2018	28/09/2018	Pending Payment
10092831	12345	GRAGRA NORRIS (430210496)	Daily Activities	04/05/2018	01/05/2018	04/05/2018	Pending Payment

First Prev Page 1 of 1 Next Last

Back

The table below explains what the different status criteria mean.

Payment Request Status	Definition
Paid	Payment has been approved and payment issued.
Incomplete	The payment request needs to be updated as it is incomplete.
Pending Payment	Payment is yet to be finalised.
Cancelled	The request has been cancelled.
Deleted	The request has been deleted.
Awaiting Approval	Approval required from the Agency.
Rejected	The payment was not processed and will not be visible to the user.

8. When the details of the payment request display, select **Back** to return to the previous page.

[Home](#) / [Payment Request](#) / [View](#) / View Payment Request Details

Payment Request Details

Payment Request Summary

[Help on this](#) ?

Bulk File Reference: -

Participant Name (NDIS Number)	Payment Request Number	Payment Amount	Invoice Number	Status
ashwin first (430214424)	10125327	\$50.00	12009	Pending Payment

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:

[Back](#)[Cancel Payment](#)

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](#).

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.

Home / Payment Request / View

Find

Search for Payment Requests

Required fields are marked with an asterisk (*)

View By: *

Please select

Selected Search Criteria
Status = Paid
[remove this criteria](#)

Reset

Search

Search Results

460 Results found

Payment Request Number	Invoice Number	Participant Name (NDIS Number)	Support Budget	Submitted Date	Support Start Date	Support End Date	Status
10125328	4567	ashwin first (430214424)	Consumables	28/09/2018	28/09/2018	28/09/2018	Paid
10125317	223214	ashwin first (430214424)	Consumables	27/09/2018	27/09/2018	27/09/2018	Paid
10125316		SHANNON PRICING CHANGES UAT 001 (430213420)	CB Daily Activity	26/09/2018	13/06/2018	13/06/2018	Paid
10125315		SHANNON PRICING CHANGES UAT 001 (430213420)	Consumables	26/09/2018	13/06/2018	13/06/2018	Paid

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.

Home / Payment Request / View / View Payment Request Details

Payment Request Details

Payment Request Summary

Help on this ?

Bulk File Reference: -

Participant Name (NDIS Number)	Payment Request Number	Payment Amount	Invoice Number	Status
ashwin first (430214424)	10125328	\$50.00	4567	Paid

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: 01/10/2018

[Back](#)
[Cancel Payment](#)

2. Select **Cancel Payment**.

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

3. Select **Yes**.

Payment Request Details

Payment Request Summary

Help on this ?

Bulk File Reference: -

Participant Name (NDIS Number)	Payment Request Number	Payment Amount	Invoice Number	Status
ashwin first (430214424)	10125328	\$50.00	4567	Paid

Support Details

Start Date:

End Date:

Category: Consumables

Item Number: 03_050903053_0103_1_1

Item Description: Incontinence Alarms

Claim Type: Standard

Cancellation Reason:

In-Kind Program:

Submitted on: 28/09/2018

Submitted By: GRAHAM BARRS

Reject Reason:

Paid on: 01/10/2018

Are you sure you would like to cancel the selected payment?

NO

YES

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

✓

The payment request was cancelled successfully.

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.

Bulk payment request upload

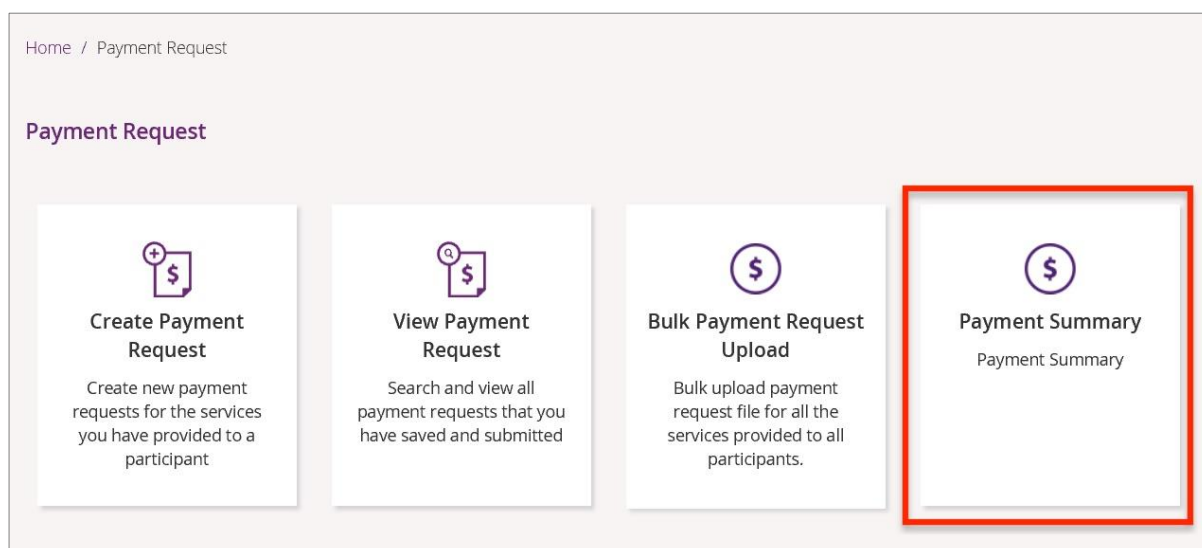
You can upload payment requests in bulk. The payment requests can be uploaded in either .csv or .xml file formats. Use the current version of the bulk upload template available on the [myplace](#) portal.

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.

Home / Payment Request / Payment Summary

Payment Summary

Below is your account summary


Pending Payment Requests
Pending Total: \$150.00 ▼ Open Section


Advance Summary ▼ Open Section

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 (*)

From Date: * 

To Date: 

Find Summary

Back

2. Select **Find Summary**.
3. Select **Open Section** to view the summary details.

Home / Payment Request / Payment Summary

Payment Summary

Below is your account summary



Pending Payment Requests
Pending Total: \$150.00 ▼ Open Section



Advance Summary ▼ Open Section

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 (*)

From Date: *  

To Date:  

Find Summary

Paid Payment Requests
Paid Total: \$100.00 ▼ Open Section 

Rejected Payment Requests
Rejected Count: 0 ▼ Open Section

Incorrect Bulk File Records
Incorrect Count: 0 ▼ Open Section

Back

Home / Payment Request / Payment Summary

Payment Summary

Below is your account summary

Pending Payment Requests

Pending Total: \$150.00

Close Section

Date	Payment Request Number	Participant Name	Description	Amount
29/09/2018	10125330	ashwin first (430214424)	NDIS Payment	\$100.00
<p>Your Invoice Number: 1234567890098765432</p> <p>Support Start Date: 27/09/2018</p> <p>Support End Date: 27/09/2018</p> <p>Support Category: Consumables</p> <p>Item Number: 03_050903053_0103_1_1</p> <p>Item Description: Incontinence Alarms</p> <p>Claim Type: Standard</p> <p>Cancellation Reason:</p> <p>Submitted by: GRAHAM JONES</p>				
28/09/2018	10125327	ashwin first (430214424)	NDIS Payment	\$50.00
04/05/2018	10092831	Tom Smith (430210496)	NDIS InKind Invoice	\$250.00
04/05/2018	300000037319	Tom Smith (430210496)		-\$250.00

First Prev Page 1 of 1 Next Last

Quotations

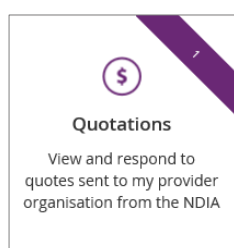
This section allows you to view and respond to quotation requests sent to your organisation by the NDIA. Quotations enable you to submit quotes to provide particular supports (for example, assistive technology, home modifications and accommodation) on a participant's plan.

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

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.

When the Agency requests a quote from you, it displays in **Quotations** with the status **Sent to Provider**.

2. To view details for a particular quote, select the **View Details** link under the **Actions** heading. The **Quote Type** is the support item.

Home / Quotations							
Quotations							
Below is a listing of quotations requested by the NDIA							
Quote Id	Date Requested	Item	Description	Quantity	Quote Type	Status	Actions
5002052	28/09/2018	06_183003384_0111_2_2	Elevator - Home	1	Home Modifications - Refurbication	Accepted	View Details
5002053	28/09/2018	06_183011388_0111_2_2	Stair Lift With Platform	1	Home Modifications - Refurbication	Accepted	View Details
5002054	28/09/2018	06_183011388_0111_2_2	Stair Lift With Platform	1	Home Modifications - Refurbication	Response Received	View Details
5002055	28/09/2018	05_053603010_0103_1_2	Standing Frame - Child Under 5	12	Home Modifications - Refurbication	Accepted	View Details
5002056	28/09/2018	06_183010387_0111_2_2	Stair Lift With Seat	1	Home Modifications - Refurbication	Rejected	View Details
5002057	28/09/2018	06_182488378_0111_2_2	Home Modifications - Bathroom Mod - Incl	2	Home Modifications - Refurbication	Accepted	View Details
5002050	27/09/2018	06_183003384_0111_2_2	Elevator - Home	1	Home Modifications - Refurbication	Accepted	View Details

The **Quotation Details** screen displays.

The table below explains what the different status criteria mean.

Quotation Status	Definition
Sent to provider	Quotation is awaiting response from the provider.
Response Received	The provider has submitted a quotation to the Agency.
Accepted	The Agency has accepted the quotation from the provider.
Rejected	The Agency has rejected the quotation from the provider.

Respond to a request for quotation

3. In the **Quotation Response** section, complete the fields:

- At **Supply Details**, enter all relevant information about the supply of the item and/or service.
- At **Specifications**, record the conditions of the quote.
- At **Inclusions**, enter all items that are included in the quote.
- At **Specific Exclusions**, record any items that are excluded in the quote.
- At **Price per Unit**, enter the total price of the quote per unit (excluding GST).
- At **GST per Unit**, record the GST amount.
- At **Terms of Quote**, select from the drop down list (number of days for which the quote is valid)

- Once all information has been entered, check that the **Quotation Amount Summary** is correct and select **Submit**.

Home / Quotations / Quotation Details

Quotation Details

View and respond to quotation request

Quotation Request

Quote Id:	5002041
Status:	Sent to Provider
Participant NDIS Number:	430213650
Participant Name:	Corey Crawford
Date Requested:	14/09/2018
Reply By Date:	12/10/2018
Item:	05_180903180_0103_1_2
Item Description:	Electric Lift Chairs - Sit To Stand
Quantity:	1
Quote Type:	Home Modifications - Refurbication


Quotation Response


Supply Details: *


Specifications: *

Inclusions: *

Specific Exclusions: *


Price per Unit: * 

GST per Unit: * 

Terms of Quote: * 


Quotation Amount Summary

Price per Unit	<input type="text"/>
Quantity	<input type="text"/>
GST per Unit	<input type="text"/>
Grand Total	<input type="text"/>

[Back](#)  [Submit](#)

A success message displays.

5. Select **Back**.

 Success - your response has been sent to the NDIS.

Home / Quotations / Quotation Details

Quotation Details

View and respond to quotation request

Quotation Request


Quote Id:	5002041
Status:	Response Received
Participant NDIS Number:	430213650
Participant Name:	Corey Crawford
Date Requested:	14/09/2018
Reply By Date:	12/10/2018
Item:	05_180903180_0103_1_2
Item Description:	Electric Lift Chairs - Sit To Stand
Quantity:	1
Quote Type:	Home Modifications - Refurbication

Quotation Response

Supply Details: *	<input type="text"/>
Specifications: *	<input type="text"/>
Inclusions: *	<input type="text"/>
Specific Exclusions: *	<input type="text" value="nil"/>
Price per Unit: *	<input type="text" value="100"/>
GST per Unit: *	<input type="text" value="0.00"/>
Terms of Quote: *	<input type="text" value="30 Days"/>

Quotation Amount Summary

Price per Unit	100.00
Quantity	1.00
GST per Unit	0.00
Grand Total	100.00

[Back](#) 

The status of the quote changes to **Response Received**.

Home / Quotations

Quotations							
Below is a listing of quotations requested by the NDIA							
Quote Id	Date Requested	Item	Description	Quantity	Quote Type	Status	Actions
5002041	29/09/2018	05_180903180_0103_1_2	Electric Lift Chairs - Sit To Stand	1	Home Modifications - Refurbication	Response Received	View Details

If the Agency 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 approved.

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

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

View a quote

To view details for a particular quote, select the **View Details** link under the **Actions** heading. Once you have sent through your quote, the Agency will accept or reject the quote.

1. To view a quote, select the **View Details** hyperlink from the listing. The quote details screen display.
2. To return to the previous page,
3. Select **Back**.

Home / Quotations / Quotation Details

Quotation Details

View and respond to quotation request

Quotation Request

Quote Id: 5002053
Status: Accepted
Participant NDIS Number: 430214441
Participant Name: CONNIE COMPLIANCE 002
Date Requested: 28/09/2018
Reply By Date: 26/10/2018
Item: 06_183011388_0111_2_2
Item Description: Stair Lift With Platform
Quantity: 1
Quote Type: Home Modifications - Refurbication

Quotation Response

Supply Details: *

Specifications: *

Inclusions: *

Specific Exclusions: *


Price per Unit: *

GST per Unit: *

Terms of Quote: *

Quotation Amount Summary

Price per Unit	1500.00
Quantity	1.00
GST per Unit	0.00
Grand Total	1500.00

[Back](#) 

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.

Provider needs to claim at the category level (not line item level).

Bulk upload – the service booking will automatically be created for the payment request.

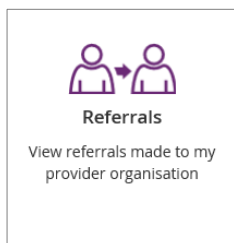
For payment requests individually entered through the provider portal, a service booking (for the appropriate support category) needs to be created beforehand.

This is only for items that require a 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.

[Home](#) Referrals

Referrals

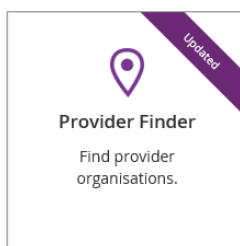
Below is a listing of referrals made to my provider organisation

Participant Name (NDIS Number)	Reason	Area of Referral	Created at
vikas test74 (430214379)	Plan-Review	Regist. Provider for	20/09/2018
VIKAS ADULT 012 UAT (430194828)	ILC Supports	Regist. Provider for	21/08/2018
VIKAS ADULT 012 UAT (430194828)	ILC Supports	Specialist Assessmt-	21/08/2018
CountryOfBirth Validation - Sept 01 (430209270)	ILC Supports	ILC/LAC Service	05/09/2017
JANE DOE 002 (430206157)	Pre-Planning	Specialist Assessmt-	24/07/2017
GRAHAM UAT BARRS (430191461)	Plan-Implementation	Specialist Assessmt-	15/06/2017
Jenny Citizen (430008997)	Plan-Review	Employment	29/11/2016
Scrambled Eggs Test (430192999)	Plan-Implementation	Transport Services	20/10/2016
GRAHAM SELF MANAGED UAT 001 (430193687)	Plan-Review	Specialist Assessmt-	29/08/2016

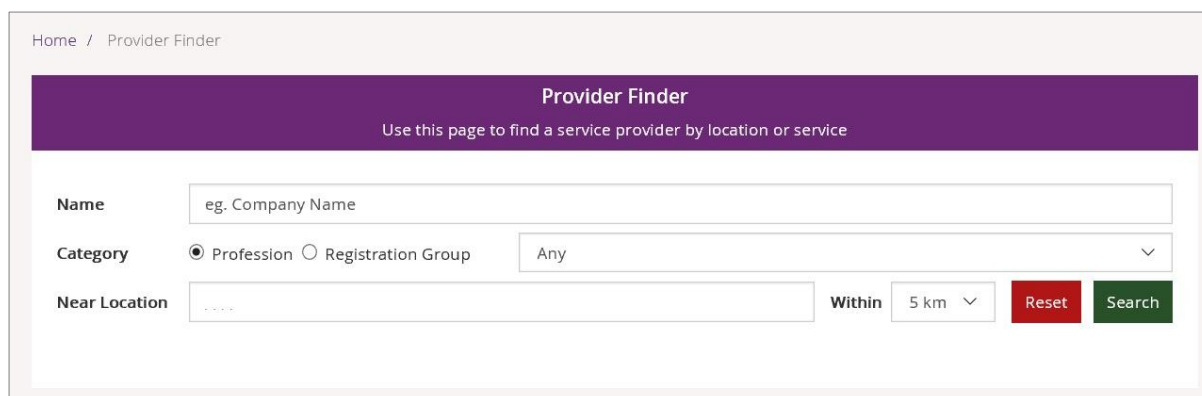
Provider Finder

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.

Home / Provider Finder

Provider Finder

Use this page to find a service provider by location or service

Name

eg. Company Name

Category

☒ Profession
☐ Registration Group

Personal Trainer

Near Location

15 Tay ST, Watson, ACT, 2602

Within

50 km

Reset

Search

Search results

10 out of 40 results for providers matching your search criteria.

Showing results for 15 Tay ST, Watson, ACT, 2602 with 50km radius.

First

Previous

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Next

Last

Big Fun

0262000000

graham.barrs@actpeace.ngo.com.au

15 Tay Street, Watson, ACT, 2076

View Details

barrs8

Temporary Closure

0433789123

[Visit provider website](#)

barrs8@gmail.com

15 Tay ST, Watson, ACT, 2602

View Details

Hard 'Wheelbarrow

0400000033

[Visit provider website](#)

graham.barrs@ndis.gov.au

15 TAY ST, WATSON, ACT, 2602

View Details

Tiger Pty Ltd

Accepting Referrals

0400000000

[Visit provider website](#)

graham.barrs@ndis.gov.au

92 Tay ST, Watson, ACT, 2602

View Details

barrs9

Not Accepting Referrals

0433890123

[Visit provider website](#)

barrs9@gmail.com

U 1 35 Tay ST, Watson, ACT, 2602

View Details

outletteset

Accepting Referrals

0212345678

naus1@gmail.com

20 Harris ST, Hackett, ACT, 2602

View Details

Ping Inc

Accepting Referrals

0261418701

[Visit provider website](#)

Anilkumar.alla@humanservices.gov.au

100 GOZZARD ST, GUNGAHLIN, ACT, 2912

View Details

Disability Assist ACT

0422323520

[Visit provider website](#)

Provider1uat@gmail.com

View Details

XYZ

Temporary Closure

0261616161

XYZ@XYZ.COM

55 Rollston ST, Amaroo, ACT, 2914

View Details

The Trustee for Neves Family Trust

0256768765

123@gmail.com

134 reed street, Canberra, ACT, 2900

View Details

First

Previous

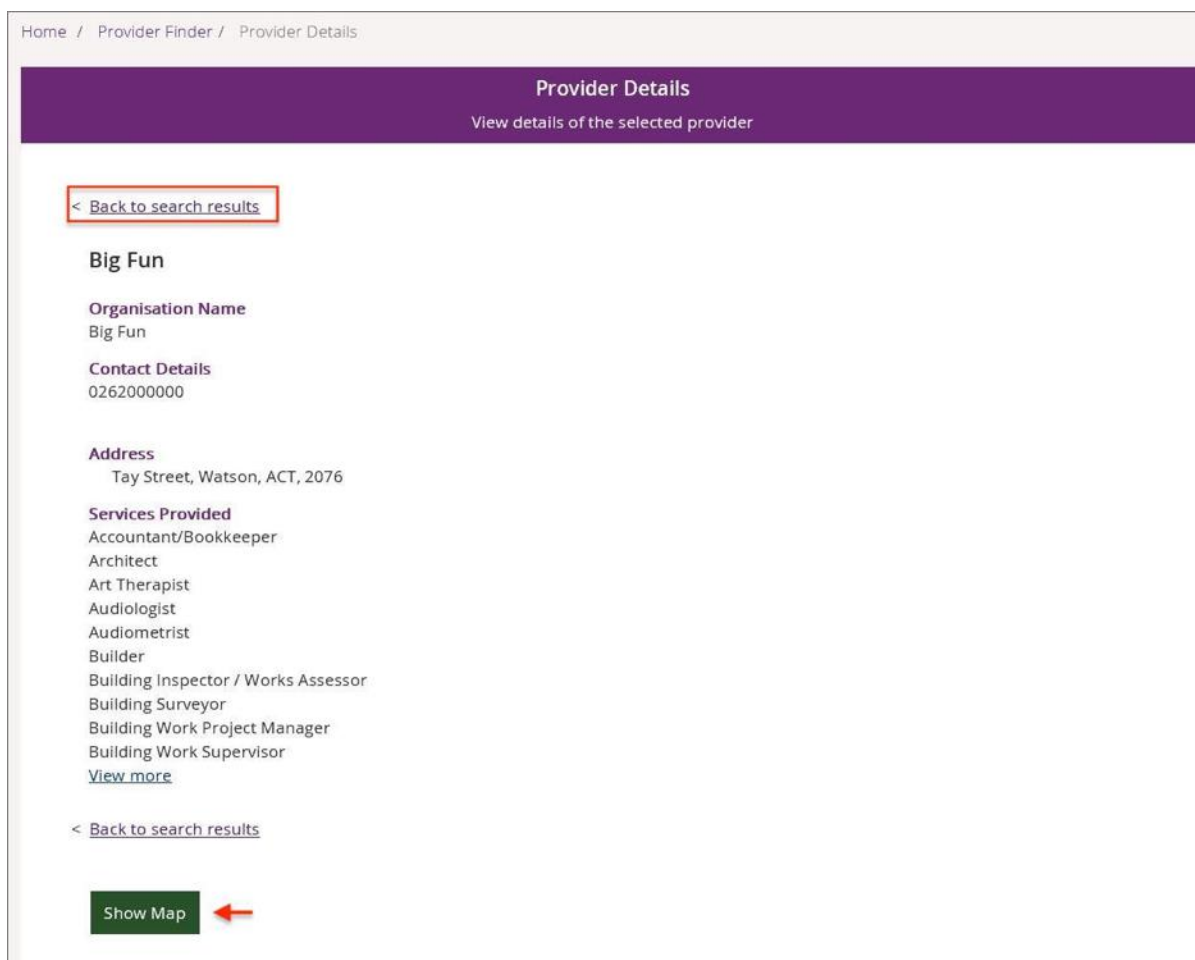
Page 1 of 4

Next

Last

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.



The screenshot shows the 'Provider Details' page for 'Big Fun'. At the top, there is a breadcrumb trail: 'Home / Provider Finder / Provider Details'. Below this is a purple header bar with the text 'Provider Details' and 'View details of the selected provider'. The main content area has a red box around a '< Back to search results' link. Below this, the provider's name 'Big Fun' is displayed. The details are organized into sections: 'Organisation Name' (Big Fun), 'Contact Details' (0262000000), 'Address' (Tay Street, Watson, ACT, 2076), and 'Services Provided' (Accountant/Bookkeeper, Architect, Art Therapist, Audiologist, Audiometrist, Builder, Building Inspector / Works Assessor, Building Surveyor, Building Work Project Manager, Building Work Supervisor). A 'View more' link is present under the services section. At the bottom, there is another '< Back to search results' link and a green 'Show Map' button with a red arrow pointing to it.

6. Select **Show Map** to view the location of the provider. Or select 'Back to search results' to return to the search results.

Home / Provider Finder / Provider Details

Provider Details

View details of the selected provider

[< Back to search results](#)

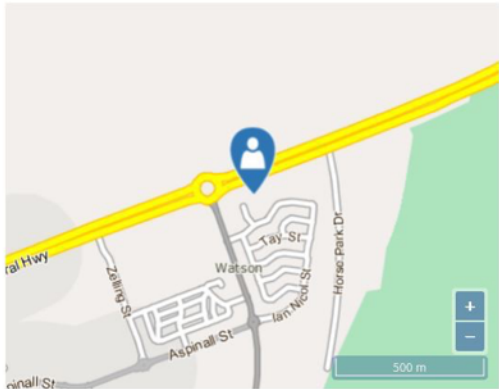
Big Fun

Organisation Name
Big Fun


Contact Details
0262000000

Address
Tay Street, Watson, ACT, 2076

Services Provided
Accountant/Bookkeeper , Architect , Art Therapist , Audiologist ,
Audiometrist , Builder , Building Inspector / Works Assessor , Building
Surveyor , Building Work Project Manager , Building Work Supervisor
[View more](#)



[< Back to search results](#)

Hide Map 

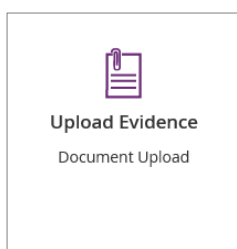
7. Select **Hide Map** to return to the **Provider Details** page. Or select 'Back to search results' to return to the search results.

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.

Document Upload
 Upload files below to provide evidence

Required fields are marked with an asterisk (*)

Upload Document ?

Document name: *

Add description:

Choose file: *

Documents relating to NDIS Quality and Safeguards Commission (NDIS Commission) such as supporting evidence for registrations in NSW or SA, must be provided to the NDIS Commission. To do this, please [navigate to the NDIS Commission portal](#)

Available Documents ?

Display rows 10

Reference number	Document name	Description	Added on
499826	MyDocu	DOBClient	12/09/2018
498509	evidence required	this is evidence	30/08/2018
498236	evidance112	Bcert	29/08/2018
497031	DoBCert	Birth Certificate	16/08/2018
496885	testprovider	provider test	15/08/2018
496868	test1	upload doc	15/08/2018
468019	test size	test anothe siz	28/03/2018
467863	vikas test to jodi	jodi test	26/03/2018
467729	testemergency	test emergency day	23/03/2018
398228	TC09		09/06/2017

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.

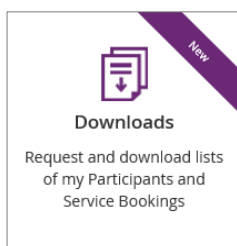
Tip: Use meaningful document names and description. For example, put the type of document (e.g. Home Modification Plan) in the Document Name, and the Participant's NDIS number in the Description.

Tip: Ensure you retain a copy of the uploaded file and are able to relate your copy to the Document Name and Description.

Downloads

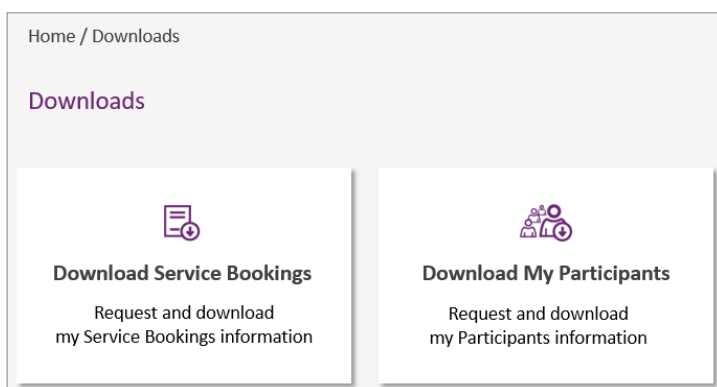
You can download in just one report information about all the service bookings you have with active participants as well as information about all the participants that you have service bookings with and who have given the NDIA consent to share their plan with you.

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



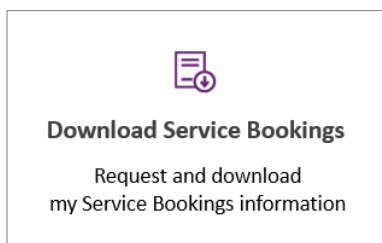
2. After you click the **Downloads** tile, you will see a new tile screen with two options:

- **Download Service Bookings**
- **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.

Home / Downloads / Download Service Bookings

Download Service Bookings

Request and download my Service Booking information

Download Service Bookings - Help ?

Request a download of my Service Bookings that were active in the last 90 days.

[Request Download](#)

List of Downloads

Requested On	Start Date	End Date	Generated On	Action
23/04/2018 11:35	12/01/2018	12/04/2018	13/04/2018 12:35	Download
23/04/2018 09:10	06/01/2018	06/04/2018	24/04/2018 12:35	Download
23/04/2018 11:35	12/01/2018	12/04/2018	13/04/2018 12:35	Download
23/04/2018 09:10	06/01/2018	06/04/2018	24/04/2018 12:35	Download
23/04/2018 11:35	12/01/2018	12/04/2018	13/04/2018 12:35	Download
23/04/2018 09:10	06/01/2018	06/04/2018	24/04/2018 12:35	Download
23/04/2018 11:35	12/01/2018	12/04/2018	13/04/2018 12:35	Download
23/04/2018 09:10	06/01/2018	06/04/2018	24/04/2018 12:35	Download
23/04/2018 11:35	12/01/2018	12/04/2018	13/04/2018 12:35	Download
23/04/2018 09:10	06/01/2018	06/04/2018	24/04/2018 12:35	Download

[First](#)
[Prev](#)
Page 1 of 1
[Next](#)
[Last](#)


[Back](#)

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.

Home / Downloads / Download Service Bookings

 The request for download has been submitted.

Download Service Bookings
 Request and download my Service Booking information

Download Service Bookings - Help 

A request for download was submitted DD/MM/YYYY HH:MM.

Cancel Request

List of Downloads

Request On	Start Date	End Date	Generated On	Action
23/04/2018 11:35	23/01/2018	23/04/2018	23/04/2018 14:35	<div style="background-color: #8bc34a; color: white; padding: 5px; display: inline-block;">Download</div>
21/04/2018 09:10	21/01/2018	21/04/2018	21/04/2018 10:22	<div style="background-color: #8bc34a; color: white; padding: 5px; display: inline-block;">Download</div>
20/04/2018 09:10	20/01/2018	20/04/2018	20/04/2018 09:55	<div style="background-color: #8bc34a; color: white; padding: 5px; display: inline-block;">Download</div>


Back

- 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.


Home / Downloads

Downloads



Download Service Bookings

Request and download
my Service Bookings information



Download My Participants

Request and download
my Participants information

- 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.

- Select **Download** to download the report you requested.

Provider portal - Step-by-step guide



Home / Downloads / Download Service Bookings

Download Service Bookings

Request and download my Service Booking information

Download Service Bookings - Help ?

Request a download of my Service Bookings that were active in the last 90 days.

[Request Download](#)

List of Downloads

Requested On	Start Date	End Date	Generated On	Action
23/04/2018 11:35	12/01/2018	12/04/2018	13/04/2018 12:35	Download
23/04/2018 09:10	06/01/2018	06/04/2018	24/04/2018 12:35	Download
23/04/2018 11:35	12/01/2018	12/04/2018	13/04/2018 12:35	Download
23/04/2018 09:10	06/01/2018	06/04/2018	24/04/2018 12:35	Download
23/04/2018 11:35	12/01/2018	12/04/2018	13/04/2018 12:35	Download
23/04/2018 09:10	06/01/2018	06/04/2018	24/04/2018 12:35	Download
23/04/2018 11:35	12/01/2018	12/04/2018	13/04/2018 12:35	Download
23/04/2018 09:10	06/01/2018	06/04/2018	24/04/2018 12:35	Download
23/04/2018 11:35	12/01/2018	12/04/2018	13/04/2018 12:35	Download
23/04/2018 09:10	06/01/2018	06/04/2018	24/04/2018 12:35	Download

First Prev Page 1 of 1 Next Last

[Back](#)

- Multiple reports can be requested on the same day.
- Pagination at 10.
- Format selection available on clicking the download button.

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.

Home / Downloads / Download Service Bookings

Download Service Bookings

Request and download my Service Booking information

Download Service Bookings - Help ?

Request a download of my Service Bookings that were active in the last 90 days.

[Request Download](#)

List of Downloads

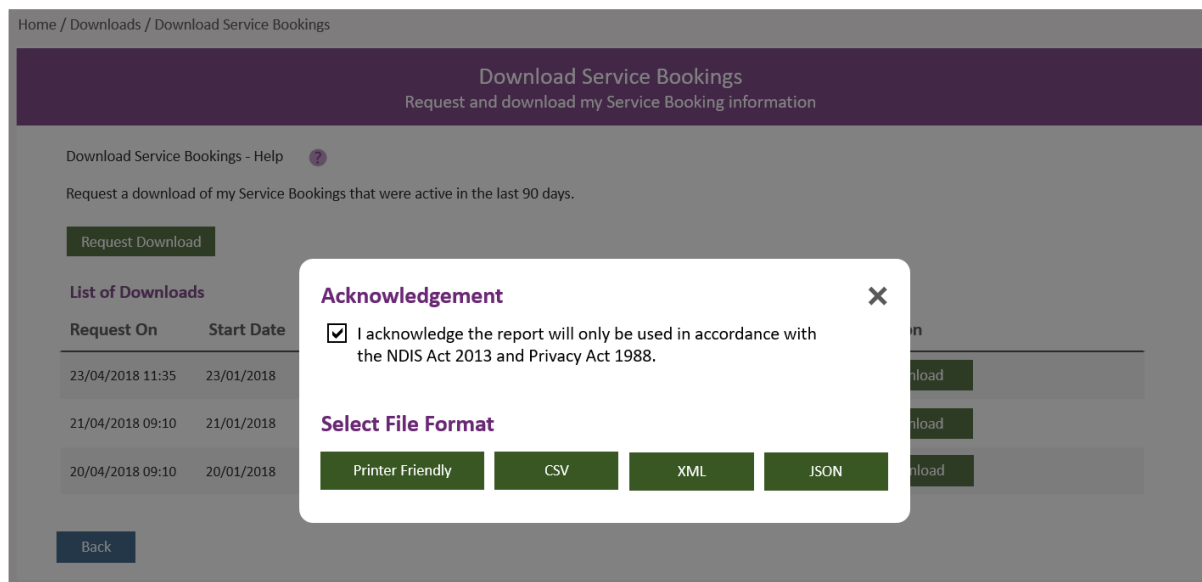
Request On	Start Date
23/04/2018 11:35	23/01/2018
21/04/2018 09:10	21/01/2018
20/04/2018 09:10	20/01/2018

[Back](#)

Acknowledgement

☐ I acknowledge the report will only be used in accordance with the NDIS Act 2013 and Privacy Act 1988.

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:

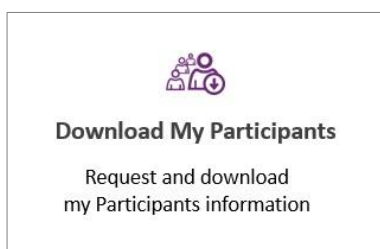
- Print Friendly — a format that allows you to view the data as a printable, readable report. If you wish to, you can use this format to output a PDF version; you will need to select to 'print to PDF' if this function is supported by your computer
- CSV (Comma Separated Values) — typically used to open 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

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.

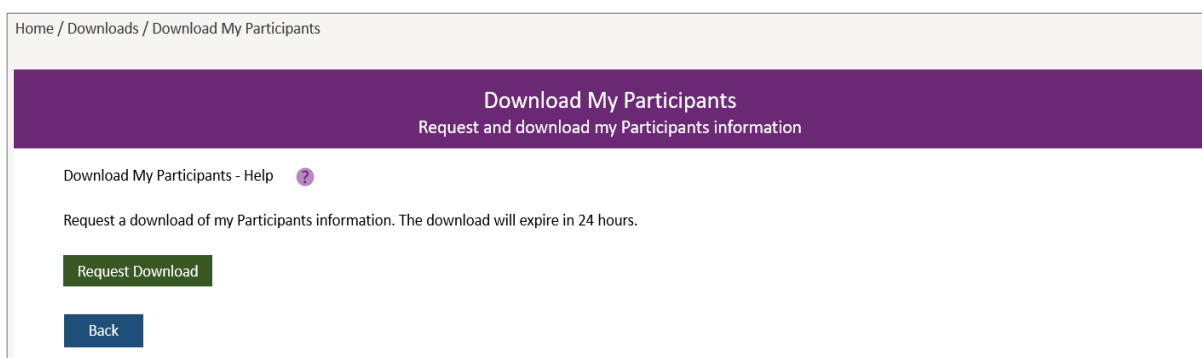
Important note: You will only be able to access information for participants who have given your organisation their consent to access their information. The information will in turn be restricted to:

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



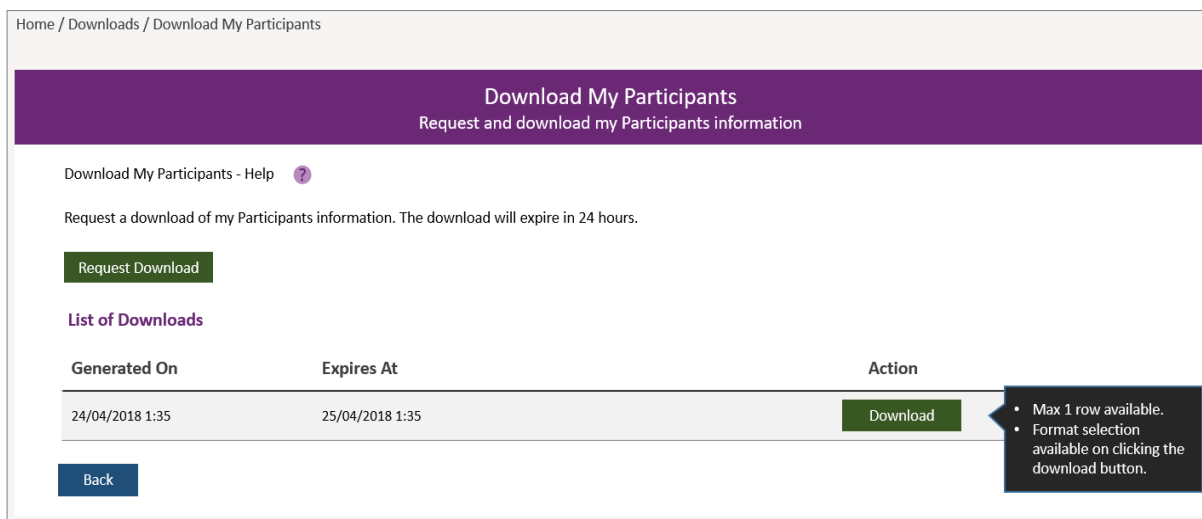
1. Select **Download My Participants** to request and download your participants information.

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.




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 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.

Home / Downloads / Download My Participants

 The request for download has been submitted.

Download My Participants

Request and download my Participants information

Download My Participants - Help 

A request for download was submitted DD/MM/YYYY HH:MM. The download will expire in 24 hours.

[Cancel Request](#)

List of Downloads

Generated On	Expires At	Action
24/04/2018 1:35	25/04/2018 1:35	Download


[Back](#)

- 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.


Home / Downloads

Downloads



Download Service Bookings

Request and download my Service Bookings information



Download My Participants

Request and download my Participants information

- 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.

- Select **Download** to download the report you requested.

Home / Downloads / Download My Participants

Download My Participants

Request and download my Participants information

Download My Participants - Help ?

Request a download of my Participants information. The download will expire in 24 hours.

[Request Download](#)

List of Downloads

Generated At	Expires At	Action
20/09/2018 11:00	21/09/2018 10:47	Download

[Back](#)

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.

Home / Downloads / Download My Participants

Download My Participants

Request and download my Participants information

Download My Participants - Help ?

Request a download of my Participants information. The download will expire in 24 hours.

[Request Download](#)

List of Downloads

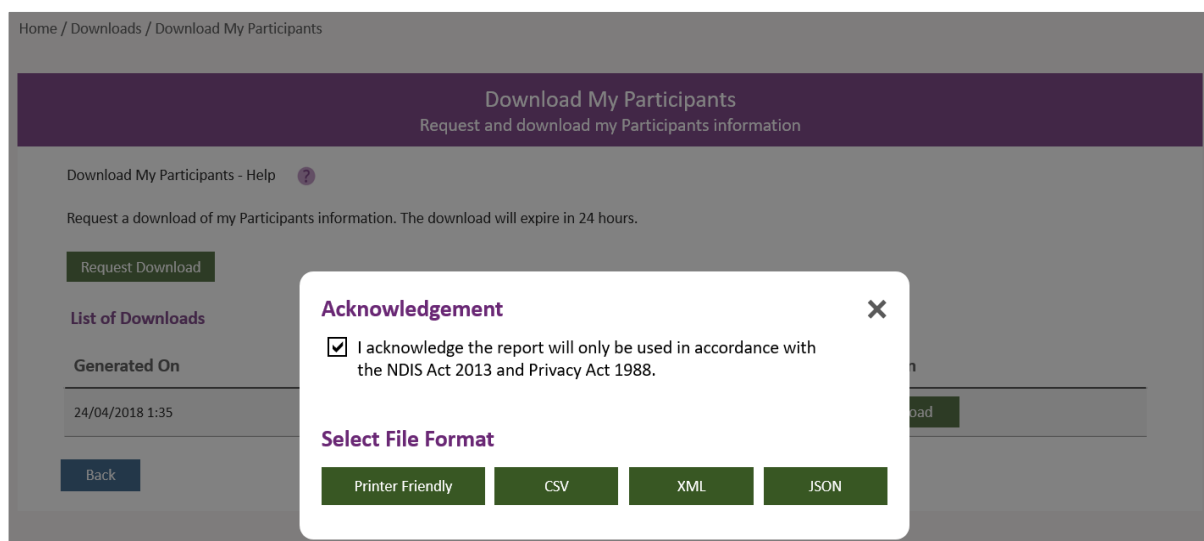
Generated On
24/04/2018 1:35

[Back](#)

Acknowledgement

☐ I acknowledge the report will only be used in accordance with the NDIS Act 2013 and Privacy Act 1988.

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