NDIS myplace portal

Step-by-step guide

August 2020
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Changes from the last version

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

- Updated instructions on who can cancel a payment request that is paid or pending (page 64)
- Updated My Contact Details screenshot to include ‘Share My Plan’ tab (page 12)

Introduction

The NDIS myplace portal (portal) is a protected and secure website that can only be accessed using myGov account login credentials.

The portal has been developed to allow you greater control over managing your own information, plan details and plan budget.

Note: the data used in the screenshots throughout this guide are have been created for instructional purposes and do not represent actual participants.

What can you do in myplace?

As an NDIS participant you can use the myplace participant portal to:

- View and update your contact details;
- View your NDIS Plan, including information about your funded supports;
- View and manage your current plan budget;
- Request payment for self-managed supports;
- Search and locate registered service providers;
- Create and manage service bookings with registered service providers;
- Manage your consent to share all or part of your plan with service providers;
- Upload and view documents; Print your plan;
- View the Planning Support Booklets; and
- myGov Inbox

Internet Browser Requirements

The portal is accessed via the internet and has the following minimum browser requirements:

Internet Explorer 11
Microsoft Edge (Version 44)
Mozilla Firefox (Version 69)
Google Chrome (Version 77)
Safari 13 (Apple Only)

Before you start

To login to the portal, you will need a myGov account and an NDIS activation code.

You can request an activation code before you become a participant, or at any time, by contacting the NDIA on 1800 800 110.
Your activation code is temporary and will expire after 10 days. If you lose your code or it expires, you can contact the NDIA and request a new code.

Before logging in for the first time, you will need to link your myGov account to the National Disability Insurance Scheme. You will then be required to input your activation code; the activation code is only required the first time you login to the portal.

Note: Instructions for creating a myGov account can be found by typing the following address into your browser address bar: https://my.gov.au/mygov/content/html/help.html

Your first login

1. Sign into myGov (my.gov.au) using your existing user name and password.

2. To link your myGov account to your NDIA record, click the Services link at the top of the page and then choose National Disability Insurance Scheme from the Link a service list.

3. Type in your NDIS Activation Code, your Last Name, and your Date of Birth, then click the Submit button at the bottom of the screen. You only need to put in the NDIS activation code the first time you access the portal. This screen will not display again.
4. The Terms of Use will be displayed the first time you sign into the portal or when there have been updates that you need to be aware of. Move the scrollbar up and down to view the Terms of Use.

5. Once you have read the Terms of Use, select the checkbox located next to I have read and accepted the terms of use and press Accept button to continue.

The portal home page displays.
Logging into the portal after linking with myGov

Once you have linked your myGov account with your NDIS account, you can access the portal via the myGov website (my.gov.au) or via NDIS website (ndis.gov.au).

The portal via myGov website

1. Log into myGov (my.gov.au)
2. Select NDIS under Your services.

The portal via NDIS website

2. In the top right hand corner click on the Portal sign in button and then select myplace participant portal from the drop down menu.

3. Enter your myGov username (email or mobile number) and password, and then click the Sign in button.

4. Depending on your myGov preferences, you will need to answer secret questions, enter a unique security code or a myGov PIN. Once answered, click the Next button. The home page displays.
myplace portal home page

The homepage displays once you have signed in. The tiles you see are specific to the stage of the pathway (your NDIS journey) you have reached, or if you are signing in as a child representative or nominee. For example, the My Plan tile is only available once you have an approved NDIS plan.

1. To return to the home page, click on the myplace icon or press the Home (house) icon.
Tiles

The following table is a brief outline of what function each tile has within the portal.

<table>
<thead>
<tr>
<th>Tile</th>
<th>Name</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1.png" alt="My Payment Request icon" /></td>
<td>My Payment Request</td>
<td>If you are self-managing all or part of your NDIS plan, this is where you can create, view and manage your payment requests (claims).</td>
</tr>
<tr>
<td><img src="image2.png" alt="My Plan icon" /></td>
<td>My Plan</td>
<td>Once you have an approved NDIS plan, this is where you can view the details of your plan, including support budget, my referrals and my funding report.</td>
</tr>
<tr>
<td><img src="image3.png" alt="My Contact Details icon" /></td>
<td>My Contact Details</td>
<td>View and edit your personal details, contact details, address, <strong>How can I contact NDIA</strong>, bank account details and consent to share your plan with providers here.</td>
</tr>
<tr>
<td><img src="image4.png" alt="My Service Bookings icon" /></td>
<td>My Service Bookings</td>
<td>Once you have an approved NDIS plan, this is where you can create, view and manage your Service Bookings with registered NDIS service providers (not applicable if you are self-managing).</td>
</tr>
<tr>
<td><img src="image5.png" alt="Provider Finder icon" /></td>
<td>Provider Finder</td>
<td>Use the Provider Finder to find a registered NDIS service provider near you. You will also be able to book in a service booking from this screen provided that the provider is taking referrals.</td>
</tr>
<tr>
<td><img src="image6.png" alt="My Messages icon" /></td>
<td>My Messages</td>
<td>Instant messaging with your providers. (Check with your provider to make sure this function is available for you).</td>
</tr>
<tr>
<td><img src="image7.png" alt="My Document Upload icon" /></td>
<td>My Document Upload</td>
<td>Upload documents to support claims or access documentation. Max files size is 25MB, required to have a Document name and description. Below upload document is all available documents previously uploaded.</td>
</tr>
</tbody>
</table>
## NDIS myplace portal: Step-by-step guide

<table>
<thead>
<tr>
<th>Tile</th>
<th>Name</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>💌</td>
<td>myGov Inbox</td>
<td>View your myGov mailbox.</td>
</tr>
<tr>
<td>📌</td>
<td>My Helpful Documents</td>
<td>Use My Helpful Documents to access and view useful support booklets available on the NDIS website</td>
</tr>
</tbody>
</table>

Select a tile displayed on the home page to go to that function. For example, selecting the My Payment Request tile will navigate you to where you can add or view your payment requests.

### Need more help?

In the lower left corner of the screen there is an option to contact the NDIA, click the [Contact Us](#) link for further information and detail on how to contact us. Please direct any queries to the NDIA on **1800 800 110** or visit your local NDIA office.

### Logging out of myplace

You can log out by selecting the down arrow next to your name at the top of the screen and Select Logout.

This will return you to the NDIS website if you signed in from there or your myGov home page if you had signed in from there.

### My Contact Details

*My Contact Details* is where you can manage your personal information. You can update your contact details, address and bank details. This is also where you can choose to share (or not to share) details of your plan with registered service providers you have a service booking with.
1. Select **My Contact Details** on the home page.

   ![My Contact Details Screen](image)

   - **About Me**
     - You can view your full name, preferred name, date of birth, NDIS number, gender, Indigenous origin and Australian South Sea Islander information (if applicable).
     
     1. Click the **Open Section** link in the top right hand corner to see the details.

     ![About Me Details](image)

     - Full Name: [Redacted]
     - Preferred Name: Not Provided
     - Date of Birth: 13/02/1980
     - NDIS Number: 430214750
     - Gender: Male
     - Indigenous Origin: Neither Aboriginal nor Torres Strait Islander
     - Australian South Sea Islander: No

     If any of these details are incorrect, please contact the NDIA to have them updated.
How Can NDIA Contact Me?

You can update your preferred method for notifications of service bookings, your preferred correspondence method (including different accessible formats) and your contact details in this section.

1. Click the Open Section link in the top right hand corner to see the details.

2. Select the Edit button in the bottom right hand corner.
3. Select a **Preferred Notifications Method** if you want to get notified when a provider has updated a service booking.

4. To change the way you receive your letters, select an option from **Sending Method** drop down menu, then choose a **Format Type** and **Format Option**.
Note: If you would like a copy of your plan in a different format to your letters click the Add Method button and follow the instructions under Preferred Plan Format section.

5. You can update your phone numbers and email address in the Contact Details section. Click into the field (or select the delete cross icon) and type in your new details.

Note: You can update your contact details with myGov and the updated details will be shared with the NDIA automatically. You must have a linked Australian Taxation Office, Centrelink or Medicare account for the updated details to be shared. If you choose to update your contact details in the myplace portal, these updates will not be shared with myGov or your other services.
6. Click the **Update button** to save all changes.

The following message displays to confirm your details have updated.

![Message indicating successful update](image)

**Please Note:** If you are a nominee or a child representative you can update your personal details in the ‘How Can NDIA Contact me?’.

1. Select the **Edit** button in the bottom right hand corner
2. The Edit Contact details displays

3. You can update your phone numbers and email address in the Contact Details section. Click into the field (or select the delete cross icon) and type in your new details.

How Can I Contact NDIA?

The How Can I Contact NDIA section provides the contact detail of your My NDIS Contact and our Contact Centre phone numbers.
My Address Details
You can view and update your postal and home (standard) addresses.

1. Click the **Edit (pencil)** icon to update an address.

2. Select the **Add Address** button to add a new address.

3. Select the **Address type** and fill out the address fields. Enter the **Start date** and then select **Update** to save.

**Note:** You can update your contact details with myGov and the updated details will be shared with the NDIA automatically. You must have a linked Australian Taxation Office, Centrelink or Medicare account for the updated details to be shared. If you choose to update your contact details in the myplace portal, these updates will not be shared with myGov or your other services.
Please Note: If you are a nominee or a child representative you can update your personal details in the 'My Contact Details'.

1. Click the **Edit** (pencil) icon to update an address

   ![My Address Details](image1)

   2. The **My Contact Details** screen displays.

      ![My Contact Details](image2)

   3. Fill out the address fields. Enter the **Start date** and then select **Update** to save.

**Share My Plan**

The **Share My Plan** function enables you to share parts of your plan with any service providers you have an active service booking with.

   ![Share My Plan](image3)

   1. Tick the box next to the provider name/s to share your plan; or untick to not share.
2. Provide a reason for the change in the **Why are you updating or changing who can see the plan** text box.

3. Click the **Submit** button to finalise the changes.

![Share My Plan](image)

**Note:** you can change a provider’s permission to view your plan at any time. It is your choice if you share your plan details with providers.

4. Click the **Close Section** link in the top right hand corner to close this section.

### My Bank Details

The **My Bank Details** function enables you to view your bank details and add new account information. When you update your bank account details, the system will send you the following SMS:

“We have updated your bank account details as requested. If necessary, contact NDIA on **1800 800 110**”.

![My Bank Details](image)

1. Click the **Open Section** link to view your bank details.

2. Click the **Add Bank Details** button to add a new account.
3. Enter the new account details and then click the Update button to save.

4. Click the Close Section link in the top right hand corner to close this section.

Note: If you are a Plan Nominee or Child Representative, contact the NDIA on 1800 800 110 to update the bank account details on your behalf.

My Plan

The My Plan tile displays once you have an approved NDIS plan. You can view your current and previous plans, your support budget and any referrals.

1. Select the My Plan tile on the homepage.
Once the **My Plan** tile opens, you will see the following tiles:

- View My Plan
- My Helpful Documents
- My Support Budget
- My Referrals
- My Funding Report

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**View My Plan**

All information about your plan is available in **View My Plan**. You can keep track of your plan review date, days remaining, My NDIS contact, goals, profile, funded supports information and access additional information in the **Find out more** section. You can also view previous plan information. This is a view only section of the portal.
1. Your current plan defaults. If you want to select a previous plan, use the Dropdown Arrow in the List of Plans section.

2. To print a copy of your plan, click on the Print this plan to PDF button on the top right hand corner of the screen.

3. Click the Open all Sections link to view all the information under each of the headings.

View My Plan: Sections of the Plan

The Personal Details section displays your NDIS Number, My NDIS Contact, the plan start and review due date and the length of the plan in months.
Contact the NDIA if you have any changes to your circumstances, which could change the supports you need to be included in your plan.

The Profile section outlines key information about you, such as your date of birth, current contact details, information about yourself (About me) and who supports you.

The Participant Goals outlines the goals you want to achieve and how you will achieve them and how you will be supported.

The Funded Supports section outlines the supports funded by the NDIS to help you achieve your goals. There is information on what the funding can be used for, how it is managed (e.g. self-managed) as well as how this funding amount is divided across the support categories (or budgets) in your plan.
EMILY's Funded Supports

My funded supports can help me achieve my goals
Managing my NDIS funding - Help 📈

Total Funded Supports $12,217.41
For 01 November 2018 - 01 November 2019

Core Supports
Core supports help with my everyday activities, my current disability related needs and to work towards my goals.

My Core Supports funding can be used flexibly across the following sub categories:

- **Assistance with Daily Life (Daily Activities)**
  - For example, assistance with everyday needs, household cleaning and/or yard maintenance.
- **Consumables**
  - For example, continence products or low cost assistive technology and equipment to improve independence and/or mobility.
- **Assistance with Social and Community Participation**
  - For example, a support worker to assist you to participate in social and community activities.
- **Transport**
  - For example, helps you to travel to work or other places that will help you achieve the goals in your plan. There may be instances where you do not have flexibility in your transport funding (your NDIS Contact can explain how you can use this funding).

### Core Supports

<table>
<thead>
<tr>
<th>Core Supports</th>
<th>Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Core Supports funding will be:</td>
<td>$60,000.00</td>
</tr>
<tr>
<td>• $60,000.00 NDIA-managed</td>
<td></td>
</tr>
<tr>
<td>Transport</td>
<td>$1,000.00</td>
</tr>
<tr>
<td>Includes support to get to work or travel to participate in social and community activities.</td>
<td></td>
</tr>
<tr>
<td>My Transport funding will be:</td>
<td></td>
</tr>
<tr>
<td>Paid as fortnightly instalments into my nominated bank account</td>
<td></td>
</tr>
<tr>
<td>Total Core Supports</td>
<td>$61,000.00</td>
</tr>
</tbody>
</table>

Capacity Building Supports
My Capacity building supports are intended to build my independence and reduce my need for the same level of support into the future. My progress and outcomes from these supports will be shared at each plan review.

Unlike my Core Supports budget, my Capacity Building Supports budget cannot be moved from one support category to another. Funding can only be used to purchase approved individual supports that fall within that Capacity Building category.

My Capacity Building funding can be spent in the following ways:

### Capacity Building Supports

<table>
<thead>
<tr>
<th>Capacity Building Supports</th>
<th>Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved daily living (CB Daily Activity)</td>
<td>$2,000.00</td>
</tr>
<tr>
<td>My Improved daily living (CB Daily Activity) funding will be: NDIA-managed</td>
<td></td>
</tr>
<tr>
<td>Improved relationships (CB Relationships)</td>
<td>$2,000.00</td>
</tr>
<tr>
<td>My Improved relationships (CB Relationships) funding will be: NDIA-managed</td>
<td></td>
</tr>
<tr>
<td>Finding and keeping a job (CB Employment)</td>
<td>$2,000.00</td>
</tr>
<tr>
<td>My Finding and keeping a job (CB Employment) funding will be: NDIA-managed</td>
<td></td>
</tr>
<tr>
<td>Increased social and community participation (CB Social, Community, Civic)</td>
<td>$2,000.00</td>
</tr>
<tr>
<td>My Increased social and community participation (CB Social, Community, Civic) funding will be: NDIA-managed</td>
<td></td>
</tr>
<tr>
<td>Support Coordination</td>
<td>$20,000.00</td>
</tr>
<tr>
<td>My Support Coordination funding will be: NDIA-managed</td>
<td></td>
</tr>
</tbody>
</table>
Note: Any items that require a quote will display as Quote required on your plan until a quote is approved by the NDIA. Once approved, the final quoted amount will display.

The Find out more section has information about who to contact if you need help with your plan, the Booklet 3 – Using your NDIS Plan that is on the NDIS website and other ways to contact the NDIA.

1. Click the My Plan link at the top of the page to navigate back.
My Support Budget

My Support Budget is a summary of your current plan support budget. You can compare your approved funds, allocated, spent and remaining budget. The budget is also broken down by how the funding is managed (i.e. Agency, Plan or Self).

Note: Move your cursor over the question icons on the screen for further information about terms or features.

1. Click on the My Support Budget tile on the My Plan page.

The My Support Budget screen displays.

Your plan start and scheduled review dates are shown at the top of the screen. A pie chart displays in percentages your Spent Funds, Allocated Funds and Available Funds. Moving your mouse cursor over the pie chart shows the dollar values.

The Understanding your Support Budget section has links to information explaining:
- My support budget – Help
- Core supports
- Capacity building supports
- Capital supports
- Stated supports
- In-kind supports
1. Scroll down the page to view the funds table. It shows Approved Funds, Spent Funds, Allocated Funds and Available Funds for each support type and support category.

<table>
<thead>
<tr>
<th>Approved Support Budget</th>
<th>Approved Funds (including stated supports)</th>
<th>Spent Funds</th>
<th>Allocated Funds</th>
<th>Available Funds</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core Supports (Self-Managed)</td>
<td>Stated Support: Incontinence Alarms</td>
<td>$612.60</td>
<td>$0.00</td>
<td>$612.60</td>
</tr>
<tr>
<td></td>
<td>Total Core Supports (Self-Managed)</td>
<td>$5,583.14</td>
<td>$1,100.00</td>
<td>$4,483.14</td>
</tr>
<tr>
<td>Core Supports (Agency-Managed)</td>
<td>Assistance with Daily Life</td>
<td>$600.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td>Total Core Supports (Agency-Managed)</td>
<td>$600.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Core Supports - Transport (Periodic)</td>
<td>Transport (Periodic)</td>
<td>$1,000.00</td>
<td>$85.54</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td>Total Core Supports - Transport (Periodic)</td>
<td>$1,000.00</td>
<td>$85.54</td>
<td>$0.00</td>
</tr>
<tr>
<td>Capacity Building Supports (Self-Managed)</td>
<td>Support Coordination</td>
<td>$2,038.80</td>
<td>$0.00</td>
<td>$2,038.80</td>
</tr>
<tr>
<td></td>
<td>Total Capacity Building Supports (Self-Managed)</td>
<td>$2,038.80</td>
<td>$0.00</td>
<td>$2,038.80</td>
</tr>
<tr>
<td>Capital Supports (Self-Managed)</td>
<td>Assistive Technology</td>
<td>$6,829.80</td>
<td>$1,310.00</td>
<td>$5,519.80</td>
</tr>
<tr>
<td></td>
<td>Stated Support: Text To Speech Device</td>
<td>$5,000.00</td>
<td>$1,310.00</td>
<td>$3,690.00</td>
</tr>
<tr>
<td></td>
<td>Home Modifications</td>
<td>$20,092.52</td>
<td>$0.00</td>
<td>$20,092.52</td>
</tr>
<tr>
<td></td>
<td>Stated Support: Elevator - Home</td>
<td>$1,278.00</td>
<td>$0.00</td>
<td>$1,278.00</td>
</tr>
<tr>
<td></td>
<td>Stated Support: Lifts/Stair Climbers/Elevator</td>
<td>$14,292.00</td>
<td>$0.00</td>
<td>$14,292.00</td>
</tr>
<tr>
<td></td>
<td>Total Capital Supports (Self-Managed)</td>
<td>$26,922.32</td>
<td>$1,310.00</td>
<td>$25,612.32</td>
</tr>
<tr>
<td></td>
<td>Total Support Budget</td>
<td>$36,144.26</td>
<td>$2,495.54</td>
<td>$32,138.26</td>
</tr>
</tbody>
</table>

Note: The value for the stated item is included in your approved funds where applicable.

2. You can view the budget by your funds management breakdown by selecting from the tabs available (for example, Self-Managed). The All Funds Type is the total values of the support budget.
View My Funding Report

The funding report provides a summary of allocated and spent funding in your plan organised by self-managed supports, agency managed supports and plan managed supports (if applicable). The funding report includes information on service booking dates and last payment request information.

You can also access My Funding Report by selecting the My Funding Report from the My Plan home screen.

You can select the View My Support Budget button at the top of the screen to return to the My Support Budget screen or Back to return to the My Plan page.
Funds Breakdown

1. Click the **Funds Breakdown** button to the right of the pie chart to view the funds information as a set of bar graphs.

The screen changes to display a detailed view of:
- What funds have been approved in your plan for each support category and support type
- What has been spent, what has been committed and what remains for each support type and support category
- Whether your support for each support category is agency managed, plan managed or self-managed.

**Note:** The figures shown do not include Payment Requests that have been submitted but not processed.
My Referrals

Your planner can add referrals to your plan and these can be viewed through My Referrals.

1. **Click the My Referrals tile on the My Plan page and your current referrals will display.**

   ![Referral Table]

   You can refine your list of referrals by using the **search by** field to select either registered providers or community groups.

2. **Select Back to return to the portal home page.**
Provider Finder

The Provider Finder enables you to find and contact a registered provider. You can also view providers you have a service booking with. This section contains contact information of providers via the View Details link, and detailed directions via the Find Directions link.

Provider Search

1. Select Provider Finder tile on the homepage.

The Provider Finder page displays.

You have the option to search by:
- **All providers**: All providers within the selected distance to your address will display.
- **Provider name**: You can enter the name of the provider you are looking for.
- **Profession/service**: You can choose the profession/service (for example, dietician) from a drop down menu.
- **Support Category**: You can choose the support category you are looking for from a drop down menu.

The following steps is an example of searching by a profession/service.

2. Select the Profession/Service tab.
3. Click the dropdown box and select a service.

4. The search radius defaults to 5 kilometres from your home address. You can expand the search distance by clicking the **within** dropdown arrow.

5. You can change the address that the search is on by clicking the delete icon in the 'of my home address or a different location' field and type in an address.

6. Select **Search**. The search results display.

7. To print your search results, select the **Print provider Information** link.

8. If there is more than one page of results use the buttons of **Next** and **Last** to look at all the providers.
9. To narrow down your search results, you can apply filters to your search by selecting the Filters button at the top of the window.

10. The following filters can be applied to your search:

- Accepting new referrals
- Open extended hours on weekdays
- Open on weekends

11. To see more information on a specific provider, select the View Details button.

12. The details of the provider will display with the following:

- **Organisational name:** The provider business name.
- **Contact person:** The name of who you can speak within the organisation.
- **Contact details:** Including contact phone numbers and email addresses.
- **Address:** The street address of the provider.
- **Outlet status:** This tells you if the provider is able to take referrals.
- **Services provided:** A list of all services provided is listed here.
- **Operating hours:** Details of the days and times the provider is open for business.
Note: If you would like to conduct another search, select Back to search results link at the top or bottom of the screen. This returns you to the Provider Finder screen, where you are able to complete another search.

13. Select Show Map if you want to see the location of the provider.
14. Once you have found the right provider, select Create Service Booking to make a booking with this provider. This button only displays if you have support funding that is Agency managed.

Recent Providers

The My recent providers section only displays if you have had service bookings. It displays the providers of your last five service bookings.

1. Select My recent providers. This list the last five providers that you have had a service booking with.
2. To view the location of these providers, select the **Show Map** near the top right hand corner of the window.

A map will populate on screen with markers identifying where the providers are located.

3. Select **Hide Map** to return to the listing of providers.

4. To view contact details and services provided by specific providers, click the **View Details** button to the right of the provider.
Document Upload

This screen is where you can send copies of documents to the NDIS.

**Note:** Once you have uploaded a document it cannot be deleted from the system.

1. Click the **Document Upload** tile on the homepage.

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

3. In the **Category** field, select from the drop down list.

4. In the **Document name** field, type the name of the document. Ensure the document name captures the main purpose of the document.
5. In the **Add description** field, type a description of the file. Ensure the description is connected to the content within the document.

6. Select **Browse** to find the file you want to upload from your computer.

**Note:** you can only upload a maximum file size of 25MB (Megabytes) per upload.

7. Once you have selected the file, click the **Upload** button to send the document to the NDIA.

8. Successfully uploaded documents are visible under the **Available Documents** section. The documents are displayed from the most recent date.

**Note:** If the matter relating to your document needs to be actioned urgently by an NDIA staff member or your Local Area Coordinator (LAC), please contact the NDIA on 1800 800 110.

**My Helpful Documents**

This screen is where you can access helpful guides and resources.

1. Select **My Helpful Documents** tile on your homepage

2. **Planning Support Booklets** hyperlink will display
3. Click on the Planning Support Booklets hyperlink

4. This will direct you to the ‘For participants’ page in the NDIS participant website.

5. The ‘For participants’ page will display

6. You will be able to select and view each booklet.

myGov Inbox

You can view all your myGov messages in the myGov Inbox.

1. Select the myGov Inbox tile on your homepage.
2. Your myGov inbox displays all messages you have in your myGov account.

![Inbox screenshot]

3. Select the **From** dropdown to view specific messages.

![Inbox screenshot with dropdown expanded]

4. Select **Unread** in the **Show** field to only display unread messages.

5. To read a message, click on the message subject hyperlink. The message displays.
6. Select **Close** to return to the Inbox screen.

7. If you want to move a message to trash, click in the tick box next to the message and then select **Move to Trash**.

8. Select **Home** to return to the myplace homepage.
My Service Booking

Service bookings are used to set aside funding for an NDIS registered provider for a support or service they will deliver. The provider can then claim payments against the service booking. A service booking will show the type of support to be provided, the length of time it is needed, and sets aside funding to pay for the support or service. Service bookings can be made by you, your nominee or a NDIS registered provider (with your consent). Self-managing supports do not have a service booking. If your plan is 100% self-managed, you do not need to go over this section.

Note: A service booking is different to a service agreement. A service agreement is an agreement between a participant and a provider. All participants should have service agreements with their providers, as the agreement sets out the expectations for the service to be delivered. Service agreements will not appear in the portal.

Service Bookings with different Funds Management

If your NDIS funds are self-managed
You don’t use service bookings because you pay your providers directly.

If your NDIS funds are plan-managed
Your Plan Manager will make one service booking, which allows the Plan Manager to claim payment from the NDIS for all services and supports in your plan. In this case, both NDIS registered and unregistered providers can be included in the service booking.

If your NDIS funds are Agency-managed
You will need to give your NDIS registered service providers your NDIS number and the relevant support areas you have been funded for, so your provider/s can create the service booking on your behalf and receive payment.

1. Select the My Service Booking tile from the home page.
The Service Booking page displays. You have two tiles:

- Add My Service Booking
- View My Service Booking

**Add My Service Booking**

You only add service bookings for supports that are Agency-managed. Your provider may have already created a service booking on your behalf, so check with them first.

1. Select the **Add My Service Booking** tile.

2. Select the **Find the Provider** button to choose your provider.

You are moved to the **Provider Finder** section of the portal.
3. Once you have found the provider, select View Details of the provider and then click the Create Service Booking button. If you need help, go to Part 4 – Provider Finder and documents guide (https://www.ndis.gov.au/participants/using-your-plan/managing-your-plan).

You are returned to the Add My Service Booking section.

4. Enter the Start Date and End Date of the service booking. Note: these dates must be within the start and end dates of the current plan.

5. Select the Find Plan button.
6. **Step 2: Select Plan** displays. Select the radio button next to the plan.

Step 3: **Support Details** and **Added Details** display.
7. The **Support Budget** displays the categories of funded supports in your NDIS Plan. Select the category from the drop down list and enter the **Allocated Amount**. Once completed, click the **Add** button.

Generally, you are not required to select an **Item Number** (this is a specific item within the support category) unless discussed with your provider. If you do specify the **Item**, the **Allocated Amount** is the agreed rate for that item. You will then enter the quantity of services needed.
8. To add more supports under the same provider, return to Step 7.
9. If you need to make changes, click the **Edit** link to amend a support, or the **Remove** link to delete a support.

10. Once all supports are added, click **Next**.
The Review screen displays.

11. Notes may be added in the comments section. The provider will see these comments.
12. Select the Submit button to create the service booking

A service booking confirmation message displays.

Select View Service Bookings to see the details of any of your service bookings.

Note: The status of the service booking you have created is Awaiting Provider Review. When the provider accepts the booking, the status will show as Active. If your provider rejects the booking, the service booking status will show as Rejected. The reason for rejection can be seen in the View Service Booking Details screen.
**View Existing Bookings**

1. Select the **View My Service Booking** tile on the **Service Booking** page.

Your service bookings display.

**Refine Search**

1. You can search by a provider or to expand the search criteria, click the **Refine Search** button.
You can search by:

- **Booking Number** – refers to the 8 digit service booking number.
- **Status** – refers to the service booking status. For example: active/inactive, awaiting review, awaiting provider review, change awaiting provider, review change or rejected.
- **Initiated by** – who initiated the booking. For example: all, participant, provider or staff.

2. Once you have entered your search criteria, select **Search**.

3. You can sort your search results by clicking the **Sort By** drop down field. The options are:
   - Initiated by
   - Service Booking Number
   - Service Booking Start Date
   - Service Booking End date
   - Submitted Date
   - Service Booking Status

4. To view details of a service booking, click on the **Service Booking Number**.
5. If the status is ‘awaiting provider review’ you can delete the service booking by selecting Delete. Once a service booking has been accepted by the provider it cannot be deleted.
6. Once you select **Delete**, the following warning message displays.

   ![Warning message]

   **Warning:**
   You are about to delete this service booking. This will remove it from your list of service bookings permanently. The provider 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.

   ![Yes/No options]

7. If you select **Yes**, you will receive the following message confirming the service booking has been deleted.

   ![Confirmation message]

   You are returned to the **View My Service Bookings** page.

**Edit a Service Booking**

You can change or end a service booking (with the status **Active**) if it was created by yourself, your provider or by the NDIA.

**Change the dollar values in a Service Booking**

1. Click the **View My Service Bookings** tile on the **Service Bookings** page.
2. Click the **Service Booking Number** of the booking you wish to edit.
3. Click the Request Update Allocation button in the bottom right hand corner of the window.

The Request Update Allocation page will display.

4. Enter the Revised Quantity and Revised Unit Price and then select Submit.

A message displays at the top of the screen stating the details have been updated successfully.
5. Click the Back button to return to the View My Service Bookings page.

The status of the service booking will change to Change Awaiting Provider Review. This means the provider can accept or reject the changes you have made. If the provider accepts the changes, the status returns to Active.

If your NDIS provider makes a change to your service booking, you will receive the following SMS notification:

“Your NDIS Provider has updated your service booking (number). Please review the change and discuss with your provider if necessary. Do not reply by SMS.”

End Service Booking

You can request to end a service booking with an active status that was created by the NDIA, your provider or yourself. The service booking will not be ended until your service provider accepts your request to end the service booking.
1. Select **View My Service Bookings** and click the Service Booking Number of the booking you wish to end.

2. Select **Request End Date Change** to end the service booking.

3. Enter the **Service Booking End Date** and select a **Reason for Change** from the drop down list.

4. Click the **Submit** button in the bottom right hand corner of the window.

5. An alert message displays confirming you want to continue. If you want to ending the service booking click **Yes**. If not, click **No**.

You will receive a message at the top of the screen confirming the details have now been successfully updated.
The status of the service booking will change to **Change Awaiting Provider Review**. This means the provider can accept or reject the changes you have made. **When** the service booking ends the status will show as **Inactive**. If the provider rejects your change for whatever reason, the status will show as **Active** and you will need to contact the provider.

**My Payment Request**

Through **My Payment Request** you can create payment requests (only for self-managed participants) and view all past payment requests (including periodic transport).

1. Click **My Payment Request** on the homepage.

The **My Payment Request** screen displays.
You have two tiles:

- **Add My Payment Request** – to create new payment requests.
- **View My Payment Request** – to see the details of all payment requests that have been submitted.

**Add My Payment Request**

This section is only for self-managed funded supports. Payment requests for funding that is Agency managed or Plan managed will be submitted by providers. Ensure you have your bank account details recorded (in My Contact Details) before you submit your payment request.

1. Click the **Add My Payment Request** tile on the **My Payment Request** screen.

The **Add Payment Request** screen displays.
2. Enter the details of your payment request. The **Support Start Date** field and **Support End Date** field will default to today’s date (change if required). Select the **Support Category** and **Claim Type** from the drop down list and enter the **Payment Amount**.

3. To help you track your payments, please enter the name of the payee in the **Provider, Business or Person** field and the **Description** of the payment. The provider, business or person name and description field are both optional fields.
Note: For more than one payment request, click the Add Another button in the lower right hand corner of the window.

4. Once all details have been entered, click the Next button on the lower right hand side of window.

The Preview page displays.
5. Check the details are correct and then tick the Declaration box. Click the Submit button on the bottom right hand side of screen.

6. The Confirmation screen displays, stating that your payment request has been received.

You can return to the home page or go to View Payment Requests.

View My Payment Requests

You can view the payment requests that were submitted by you, a provider or an NDIA staff member. Periodic transport payments can also be viewed in this screen.

1. Click the My Payment Request tile on the home page.
2. Select the View My Payment Request tile.

The View Payment Requests page displays.

3. Choose the Payment Request Type from the drop down menu. The following steps are an example for submitted payment requests.

4. For View Submitted Payment Requests, the following screen displays.

5. Click the Search button for a full list of all requests, or type in dates to view payments within a selected time period. A list of your payment requests display.
6. You can navigate through the payment request results by clicking the First, Back, Next and Last buttons.

7. Click on the Payment Request Number to view details about the payment request.
Cancel Payment Requests

You can cancel payment requests you have submitted if they have the status of Paid and/or Pending.

Note: The payment can be cancelled by the person who submitted the payment request.

- Where a payment request is submitted by the Nominee, the payment can be cancelled by the Nominee. The participant is unable to cancel this payment. The Cancel Payment button is displayed only for the Nominee.
- Where a payment request is submitted by a Participant, the payment can be cancelled by the Participant. This payment cannot be cancelled by the Nominee. The Cancel Payment button is displayed only for the Participant.

1. In View Payment Requests, click on the Payment Request Number link.

<table>
<thead>
<tr>
<th>Search Results - Submitted Claim</th>
</tr>
</thead>
<tbody>
<tr>
<td>Showing 1 - 10 of 17 payment requests</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Payment Request Number</th>
<th>Submitted Date</th>
<th>Support Category</th>
<th>Support Start Date</th>
<th>Support End Date</th>
<th>Payment Total</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>10201829</td>
<td>23/06/2020</td>
<td>Initial Supports</td>
<td>11/06/2020</td>
<td>11/06/2020</td>
<td>$85.00</td>
<td>Rejected</td>
</tr>
<tr>
<td>10301829</td>
<td>23/06/2020</td>
<td>Initial Supports</td>
<td>22/06/2020</td>
<td>22/06/2020</td>
<td>$85.00</td>
<td>Awaiting Approval</td>
</tr>
<tr>
<td>10301830</td>
<td>23/06/2020</td>
<td>Initial Supports</td>
<td>18/06/2020</td>
<td>18/06/2020</td>
<td>$95.00</td>
<td>Awaiting Approval</td>
</tr>
<tr>
<td>10301831</td>
<td>23/06/2020</td>
<td>Initial Supports</td>
<td>18/06/2020</td>
<td>18/06/2020</td>
<td>$150.00</td>
<td>Paid</td>
</tr>
<tr>
<td>10301832</td>
<td>23/06/2020</td>
<td>Initial Supports</td>
<td>16/06/2020</td>
<td>16/06/2020</td>
<td>$120.00</td>
<td>Paid</td>
</tr>
<tr>
<td>10301735</td>
<td>22/06/2020</td>
<td>Initial Supports</td>
<td>16/06/2020</td>
<td>16/06/2020</td>
<td>$65.00</td>
<td>Paid</td>
</tr>
<tr>
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<td>22/06/2020</td>
<td>Support Coordination</td>
<td>10/06/2020</td>
<td>10/06/2020</td>
<td>$145.00</td>
<td>Paid</td>
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<tr>
<td>10295525</td>
<td>01/05/2020</td>
<td>Consumables</td>
<td>04/03/2020</td>
<td>04/03/2020</td>
<td>$50.00</td>
<td>Paid</td>
</tr>
<tr>
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<td>11/03/2020</td>
<td>Consumables</td>
<td>01/01/2020</td>
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<td>$500.00</td>
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<tr>
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<td>11/03/2020</td>
<td>Consumables</td>
<td>04/03/2020</td>
<td>04/03/2020</td>
<td>$10.00</td>
<td>Paid</td>
</tr>
</tbody>
</table>

2. A summary of the payment request displays.
3. Click the **Cancel Payment** button on the bottom right hand corner of the window.

   Note: If the **Cancel Payment** button is not available, please contact NDIS.
4. Select the Yes button to cancel the payment request.

You are returned to the View Payment Requests page. A confirmation message will display, confirming the payment request has been cancelled successfully.

5. Select Home to return to the main homepage.

My Messages

This tile will only display if you have an active service booking with a registered provider. You can send instant messages to your providers.

1. Click on the My Messages tile on the home page.
2. The My Messages page displays.

3. Select the chosen provider from the drop down list under My Provider List.

4. Type your message in the yellow box and click the paper plane icon ( ) to send the message.

**Note:** Conversations (messages) will appear under the Conversations with tab. You can continue a conversation by selecting the providers’ name.
Leaving Feedback

If you would like to provide feedback, a compliment, complaint or enquire about an internal review or external review, this section allows you to record your feedback and submit it to the agency.

1. From anywhere in the portal, click the Feedback link at the very bottom of the page.

   ![Feedback Link]

   The Feedback Form opens.

   ![Feedback Form]

   2. Enter a Description in the free text field and select a Feedback Type and Primary Category from the drop down lists. In the Feedback Details field provide as much information as possible to assist the staff with your enquiry.

   3. Select the Submit button in the lower right hand corner of the screen.
4. A message with the reference feedback number will display.

![Feedback Submitted](image)

Your feedback is successfully submitted to NDIA. Feedback number: 800367631

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**Logging out of myplace**

Once you have completed all your tasks within the portal, log out by clicking on the down arrow next to your name at the top of the screen and select **Logout** from the drop down menu.

If you signed in via the NDIS website, you will be returned to the NDIS front page. If you signed in via the myGov website, you will be returned to your myGov homepage.