NDIS myplace provider portal

Step-by-step guide

Part 2. Maintaining your information

July 2020
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Changes from the last version

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

- New section “How to contact NDIS” (page 4)
- Update provider organisation role for account managers and primary contacts (page 11)
- Update WA transition to NDIS Quality and Safety Commission date from 1 July 2020 to 1 December 2020 (page 14)
# How to contact NDIS

## Contact the NDIS by

<table>
<thead>
<tr>
<th><strong>NDIS Webchat</strong></th>
<th><strong>Phone</strong></th>
<th><strong>provider portal</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>You can live chat with us about:</td>
<td>You can call us about:</td>
<td>You can use the provider portal to:</td>
</tr>
<tr>
<td>- myplace provider portal</td>
<td>- myplace provider portal</td>
<td>- Submit a payment enquiry</td>
</tr>
<tr>
<td>- Service bookings</td>
<td>- Service bookings</td>
<td>- Submit a general enquiry, feedback, compliment or a complaint</td>
</tr>
<tr>
<td>- Payment requests</td>
<td>- Payment requests</td>
<td>- Search for a provider</td>
</tr>
<tr>
<td>- Quotes</td>
<td>- Quotes</td>
<td>- Upload documents</td>
</tr>
<tr>
<td>- Referrals</td>
<td>- Referrals</td>
<td></td>
</tr>
<tr>
<td>- Request for service</td>
<td>- Request for service</td>
<td></td>
</tr>
<tr>
<td>- Searching for a register provider</td>
<td>- Searching for a register provider</td>
<td></td>
</tr>
<tr>
<td>- Submitting a general enquiry, feedback, compliment or a complaint</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Email us</strong></th>
<th><strong>Contact and Feedback form</strong></th>
<th><strong>Mailing address</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="mailto:enquiries@ndis.gov.au">enquiries@ndis.gov.au</a></td>
<td>NDIS Online Form</td>
<td>National Disability Insurance Agency</td>
</tr>
<tr>
<td>You can email us about:</td>
<td>You can use the Online form to:</td>
<td>GPO Box 700</td>
</tr>
<tr>
<td>- Submitting a general enquiry, feedback, compliment or a complaint</td>
<td>- Submit a general enquiry, feedback, compliment or a complaint</td>
<td>Canberra ACT 2601</td>
</tr>
<tr>
<td>- Emailing a document, form report or letter</td>
<td>- Request a call back</td>
<td>You can mail us:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Compliment, complaint or provide feedback,</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Document, form, report or letter</td>
</tr>
</tbody>
</table>
Maintaining your information

These functions enable you to:

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

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

<table>
<thead>
<tr>
<th>Profile</th>
<th>View your profile details below.</th>
</tr>
</thead>
<tbody>
<tr>
<td>About Me</td>
<td><img src="#" alt="Open all sections" /> <img src="#" alt="Close all sections" /></td>
</tr>
<tr>
<td>My Organisation Details</td>
<td><img src="#" alt="Open Section" /></td>
</tr>
<tr>
<td>How Frequently Can NDIA Contact Me?</td>
<td><img src="#" alt="Open Section" /></td>
</tr>
<tr>
<td>Organisational Staff</td>
<td><img src="#" alt="Open Section" /></td>
</tr>
<tr>
<td>Bank Details</td>
<td><img src="#" alt="Open Section" /> <img src="#" alt="Close all sections" /></td>
</tr>
</tbody>
</table>
About me

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

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

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

1. View name and contact information for your organisation in the My Organisation Details section. Select Edit to update whether the provider should display in the Provider Finder, and if so whether the address should also be displayed.

Note: The following steps are only available if you are the account manager for your organisation.

2. Select ‘Yes’ if the provider should display in the Provider Finder, and if so whether the address should also be displayed. Then select Update.
How Frequently Can NDIA Contact Me?

Nominate how often your organisation wants to be notified about changes to service bookings and quotations, and new Requests for Service sent to your organization for review. For new Requests for Service you will be notified immediately. For service bookings and quotations you can choose to be notified:

- Immediately
- Daily
- Weekly
- Never

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

![Profile page](image1)

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

![How Frequently Can NDIA Contact Me?](image2)

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

4. Choose from Yes and No to update your Request for Service email preferences.

5. 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.

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

Organisational staff

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

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

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

<table>
<thead>
<tr>
<th>Contact type / Responsibility role</th>
<th>Account manager</th>
<th>Primary contact</th>
<th>Alternative contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number allowed (per Organisation)</td>
<td>Multiple</td>
<td>One</td>
<td>Unlimited</td>
</tr>
<tr>
<td>Create Service bookings</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Submit Payment requests</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Cancel Paid and Pending Payment requests</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Add/ Remove contacts</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Update Bank account</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>

If you have the account manager role, you can edit the staff roles for your organisation through the Organisational Staff section.
Important note: The first person who links to an organisation will be automatically assigned the roles primary contact and account manager. This applies whether the registration is processed through the NDIA or the Commission.

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

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

Tip: The Contact Type available to select will be limited to the roles the staff member does not hold.

Tip: An individual user cannot hold both primary contact and alternate contact roles at the same time.
Bank details

The NDIA will pay Payment Requests from your organisation to this account.

1. To add bank account details, select Add Bank Detail from the Bank Details section.
   Note: Only the account manager can add or edit bank accounts details.
   Note: Bank details cannot be updated if there are payments approved but not yet paid. Changed bank details will take effect immediately.

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

3. Once you have saved your bank account details, use the Edit button if you need to change the account details.
   Note: Whenever the bank account details are added or edited, the primary contact for your organisation will receive an SMS stating: 
   We have updated your bank account details as requested. Contact NDIA on 1800 800 110 if you need to.
Registration details

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

Responsibility for the registration of NDIS providers commenced transition to the NDIS Quality and Safeguards Commission for states ACT, NT, QLD, TAS, NSW, SA and VIC.

Note: WA transition to the NDIS Quality and Safety Commission will commence on 1 December 2020.

From 1 July 2019, 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.
## Provider portal step-by-step guide

<table>
<thead>
<tr>
<th>Function</th>
<th>Provider type</th>
<th>NDIA</th>
<th>NDIS Commission</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provider registration</td>
<td>New provider registration in all states/territories except WA</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>Provider registration in WA</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>• Add registration/edit registration group</td>
<td>Registered providers in all states except WA</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>• Add/edit registration</td>
<td>Registered providers in WA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Add/edit outlets</td>
<td>Registered provider in WA</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Organisational detail changes:</td>
<td>Registered providers in all states except WA</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>• Address</td>
<td>Registered providers in WA only</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>• Contact details etc.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Edit bank account details</td>
<td>All providers</td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>

Add new registration group

**Note**: The following process applies to providers registered in Western Australia only. Providers registered in all other jurisdictions need to contact NDIS Quality and Safeguards Commission to update/edit registration details.

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

   ![Registration Details](image)

   *View and edit your registration details*

2. Select **Add Registration Group**.

   ![Add Registration Group](image)

3. Select the **Registration Group** from the dropdown list.
4. Select the most appropriate professions from the **Professions** dropdown.

5. Select the relevant states/territory from the **State(s)/Territories** dropdown. This will apply only to providers in Western Australia. Providers in all other jurisdictions will need to contact NDIS Quality and Safeguards Commission to update/edit registration details.

**Note:** Please refer to the [Guide to Suitability for description of professional requirements](www.ndis.gov.au).
Note: If you select a state/territory other than Western Australia, the following screen displays.

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

7. Nominate your state/territory and select Submit.
A message will display stating that the registration details have been successfully submitted.

**Important:** This service can only be delivered after your registration has been approved by the Agency (indicated by a status of Approved on the Registration Details screen with the relevant start and end dates and a Certificate of Registration sent to your myplace portal inbox).

**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, contact the NDIS Contact Centre on 1800 800 110.
2. Select ‘Go to NDIS Commission’ to continue registration in the Commission system or ‘Select another Registration Group’ to return to the Registration group selection.

**Note:** Please refer to the [Guide to Suitability for description of professional requirements](https://www.ndis.gov.au/). Select **Submit**; if you want to cancel the action, select **Cancel**.

### Outlet management

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

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

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

1. Select the **Outlet Management** tile on the **myplace** home page.
The **Outlet Management** page displays.

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

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

![Outlet Management](image)

**Note:** If you select a state/territory that has been transitioned to the NDIS Quality and Safeguards Commission you will be redirected to the Commission portal. The Add a New Outlet Details page displays.

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

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

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

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

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

6. In the Service Details section, select the Locations of the Service from the dropdown menu.

Note: The list is limited to states/territories where the organisation is registered to provide services, and that have not yet been transitioned to the NDIS Quality and Safeguards Commission.

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

8. In the Operating Hours section, select the days that the outlet is open by ticking the boxes. Also, update the start and end times for each of the selected days.

9. Select Submit once you have filled out the required information.
A message displays stating that the outlet has been created successfully.
Provider portal step-by-step guide

Edit an Outlet

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

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

   ![Outlet Management](image)

   The View Outlet Details page displays.

   ![View Outlet Details](image)
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**.

   ![Edit Outlet Details](image)

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

   ![View Outlet Details](image)
Preview the Outlet

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

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

The Provider Finder preview screen, displays.

2. Select Back to return to the previous screen.

3. Select Edit Outlet Details to make more updates, alternatively, you can select Print provider information to print the provider details in an easy to read format.
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.

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

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

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

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