NDIS myplace provider portal

Step-by-step guide

Part 2. Maintaining your information

December 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:

As of 1 December:

- The NDIS Quality and Safeguards Commission (NDIS Commission) will commence operations in Western Australia (WA), providing a single national registration and regulatory system for NDIS providers that will set a consistent approach to quality and safety across Australia.

- WA providers registered with the NDIA before 1 December 2020 will have their registration details transferred to the NDIS Commission.

- WA Providers will need to register or maintain their registration record with the NDIS Commission in line with all other states and territories.

To support this change, we have removed the following chapters as you can only view your registration and outlet management details:

- Registration Details
- Add new Registration Details
- Edit Registration Details
- Add a new Outlet
- Edit an Outlet
- Preview the Outlet

Content has been updated in the following chapter:

- My Organisation Details (page 7)

How to contact NDIS

Contact the NDIS by

NDIS Webchat

You can live chat with us about:

- myplace provider portal
- Service bookings
- Payment requests
- Quotes
- Referrals
- Request for service
- Searching for a register provider

Phone

1800 800 110You can call us about:

- myplace provider portal
- Service bookings
- Payment requests
- Quotes
- Referrals
- Request for service
- Searching for a register provider
- Submitting a general enquiry, feedback, compliment or a complaint

provider portal

You can use the provider portal to:

- Submit a payment enquiry
- Submit a general enquiry, feedback, compliment or a complaint
- Search for a provider
- Upload documents

Email us

enquiries@ndis.gov.au

You can email us about :

- Submitting a general enquiry, feedback, compliment or a complaint
- Emailing a document, form report or letter

Contact and Feedback form

NDIS Online Form

You can use the Online form to:

- Submit a general enquiry, feedback, compliment or a complaint
- Request a call back

Mailing address

National Disability
Insurance Agency
GPO Box 700
Canberra ACT 2601

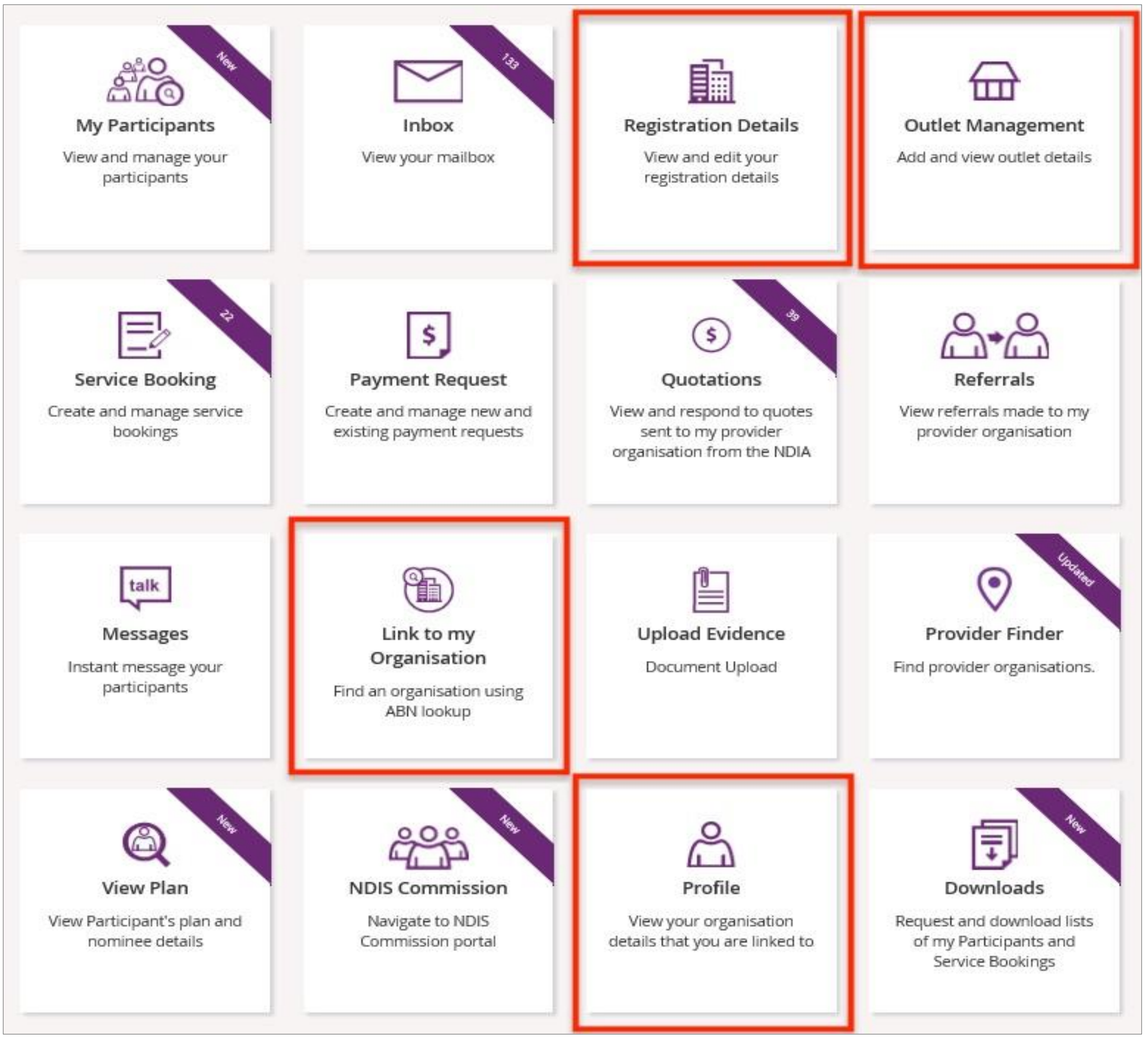
You can mail us:

- Compliment, complaint or provide feedback,
- Document, form, report or letter

Maintaining your information

These functions enable you to:

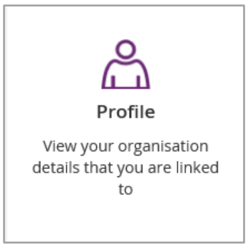
- View your **Profile** (your and your organisation's contact information and roles within the provider portal).
- View your **Registration details** (the services you are approved to provide under the NDIS). To register and maintain your registration details and registration groups you will need to contact the NDIS Quality and Safeguards Commission.
- View your **Outlets** (the times and places from which you deliver services). To add or edit outlet information for outlet you will need to contact the NDIS Quality and Safeguards Commission.
- Manage the organisations which **Link to my Organisation** (the organisations you work for).



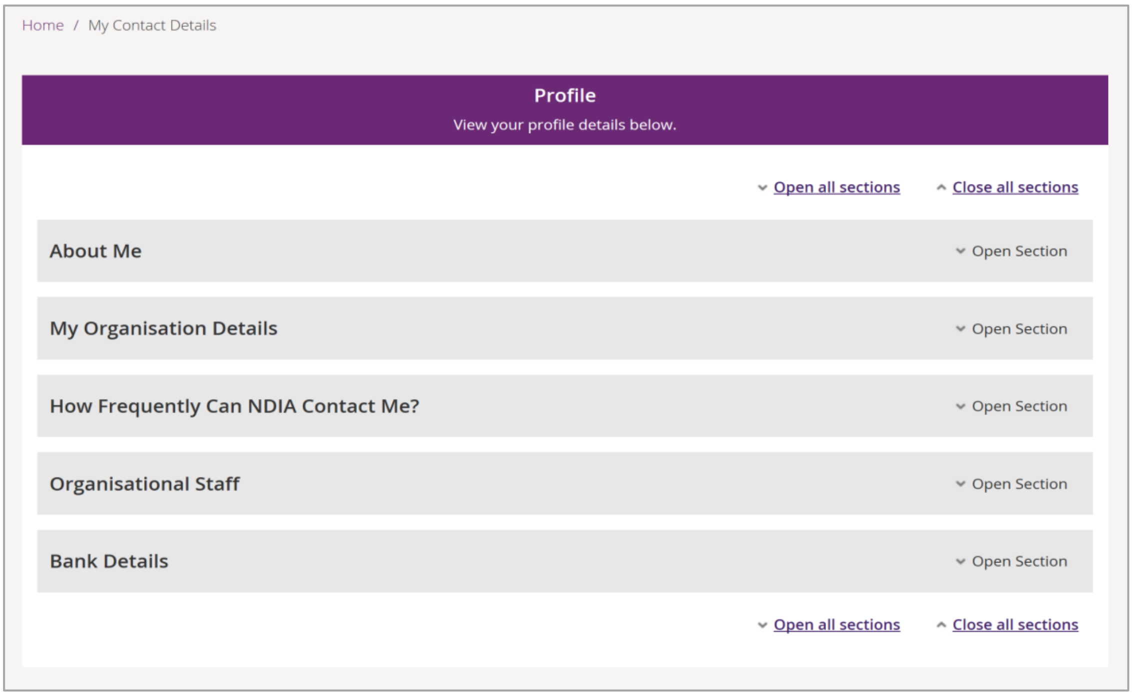
Profile

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

1. Select the **Profile** tile on the **myplace** home page, or the **Person** icon from other pages.

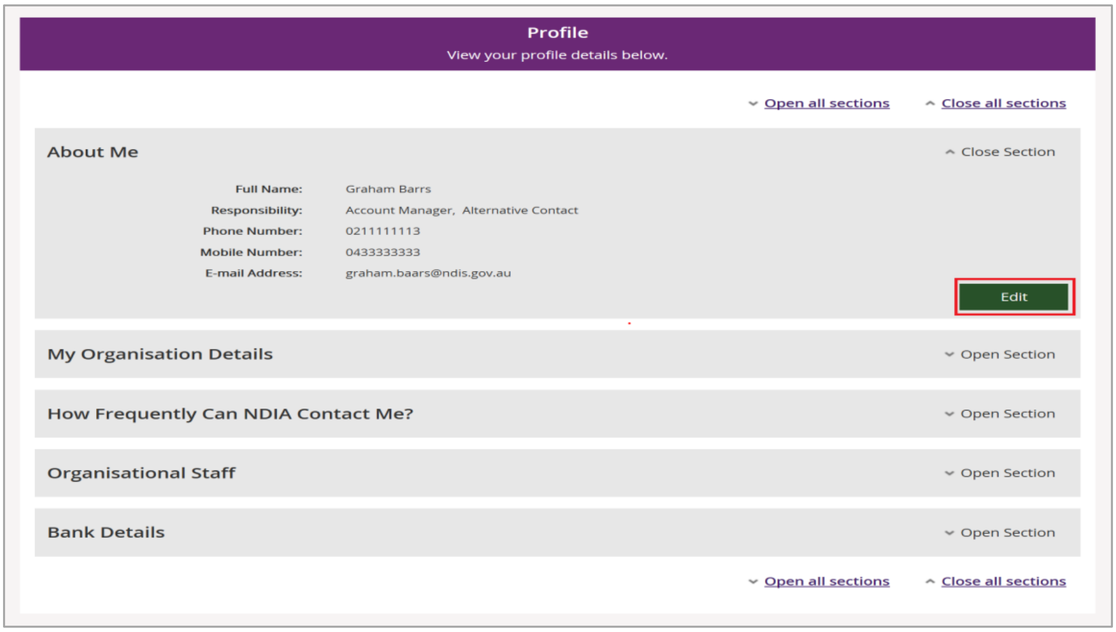


2. The **Profile** page displays. Use the **Open** and **Close** section buttons to see all the information.

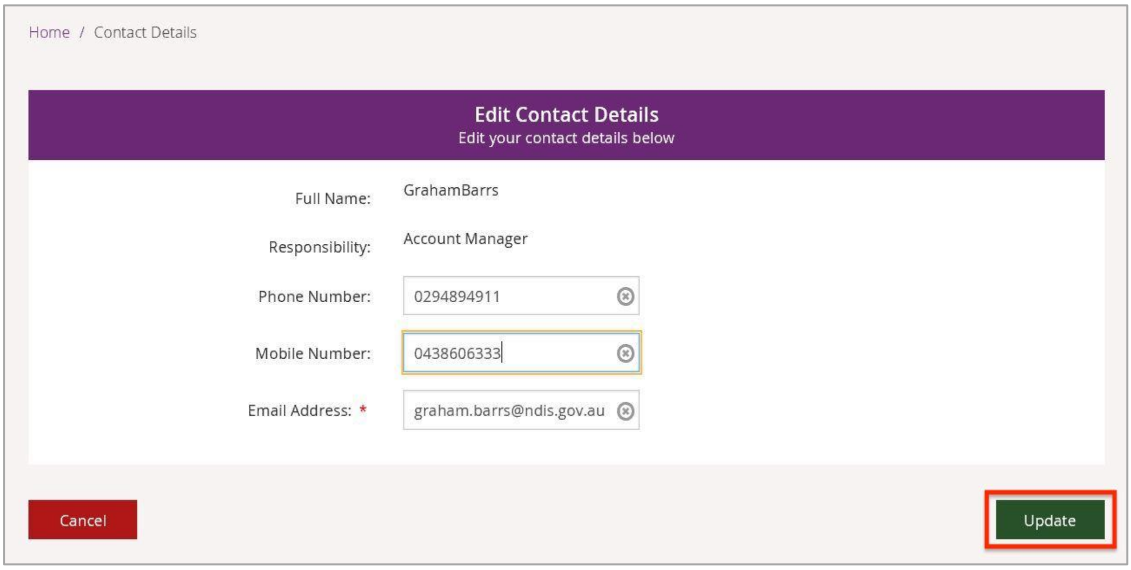


About me

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

To update your organisation details you will need to contact the NDIS Quality and Safeguards Commission.

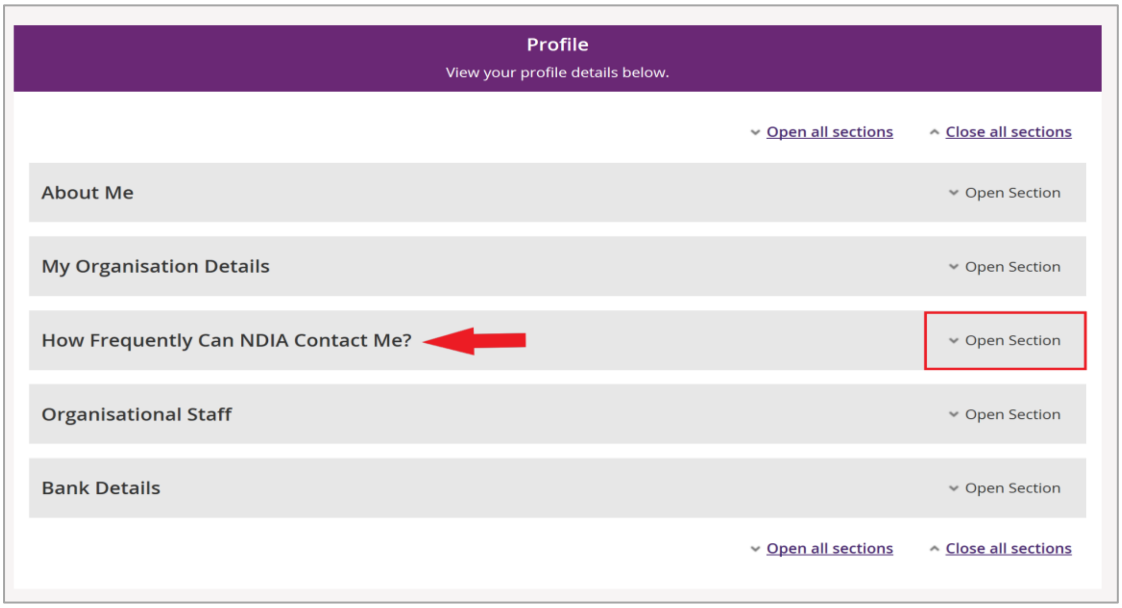
How Frequently Can NDIA Contact Me?

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.

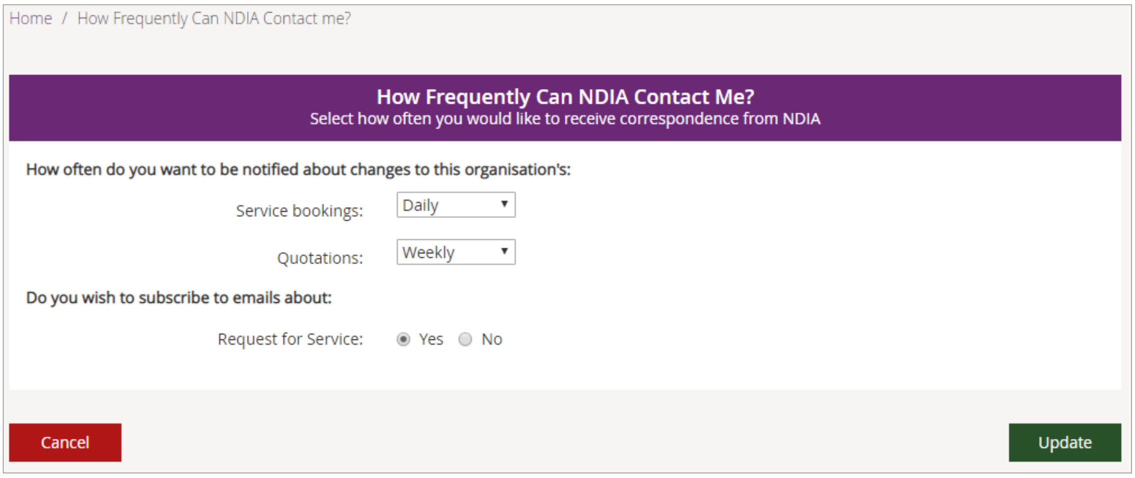
1. Select **Open Section** to view or edit your information.



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

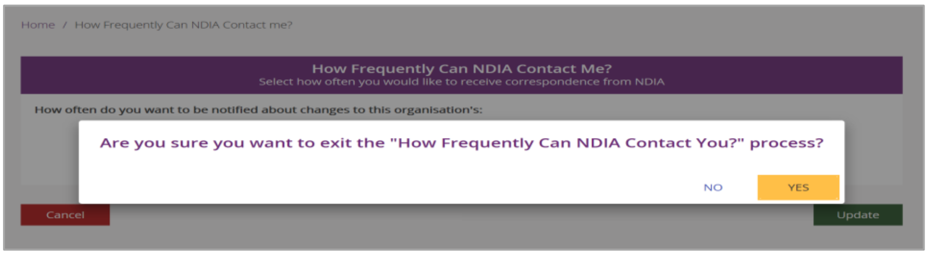
3. Choose from the drop-down how often you wish to receive service bookings and quotations notifications and select **Update**:
    - Immediately

- 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.

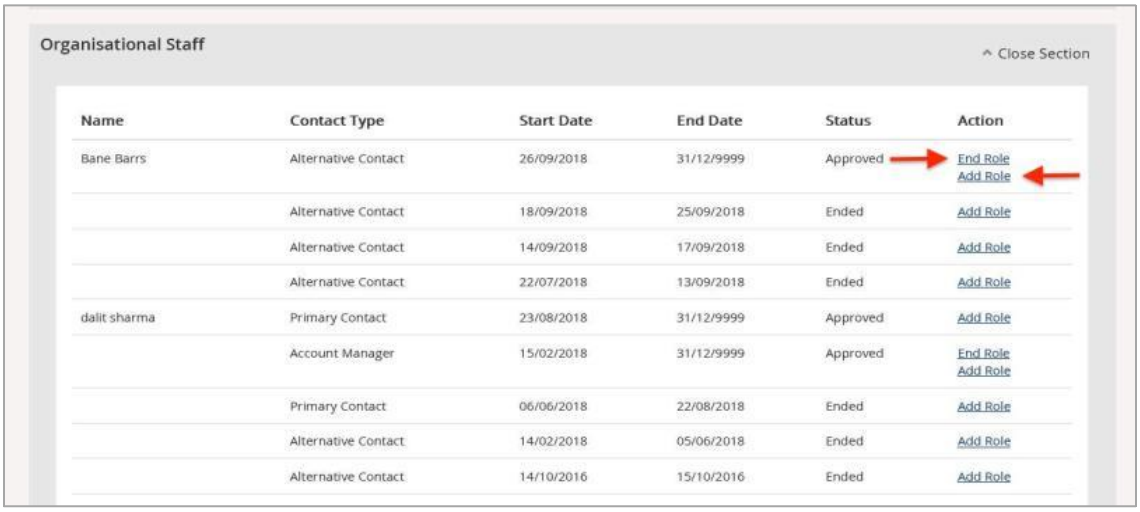
Depending on your role, you can view your profile, edit your details, edit contacts and update bank account details. The roles available are:

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

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 when the registration is processed through the NDIS Quality and Safeguards 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**.

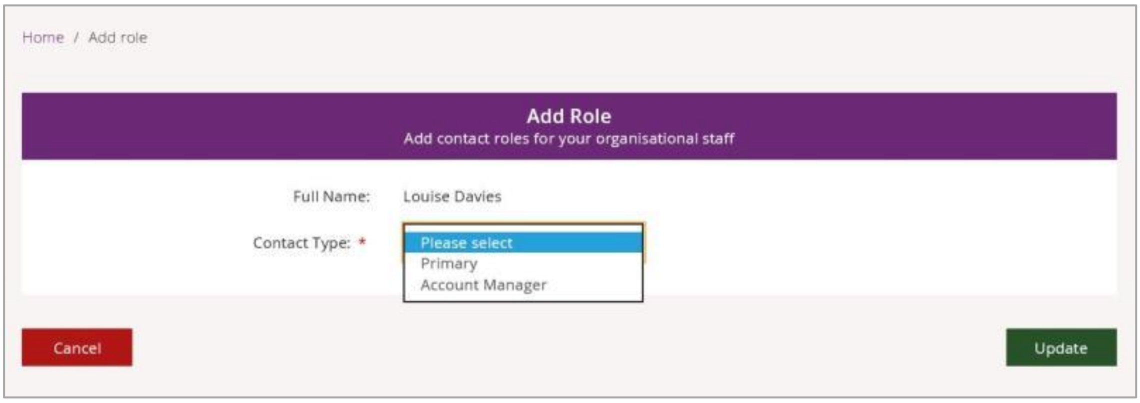


Organisational Staff

^ 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** drop-down 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

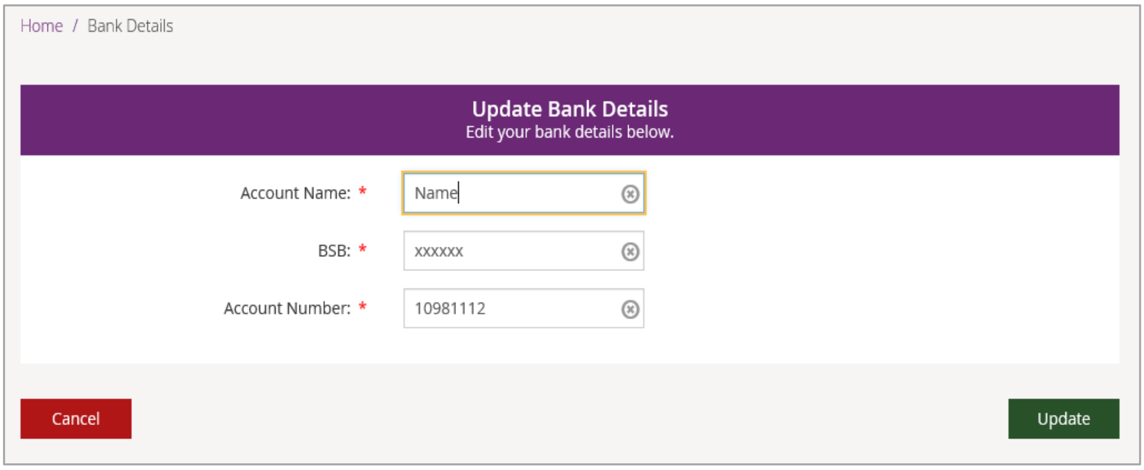
The NDIA will pay **Payment Requests** from your organisation to this account.

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.

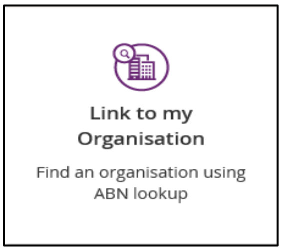
Note: Whenever the bank account details are added or edited, the primary contact for your organisation will receive an SMS stating:

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

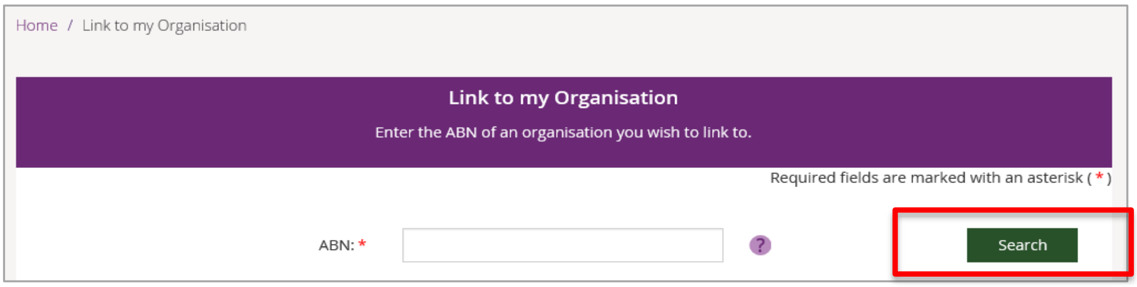
Link to my organisation

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**.

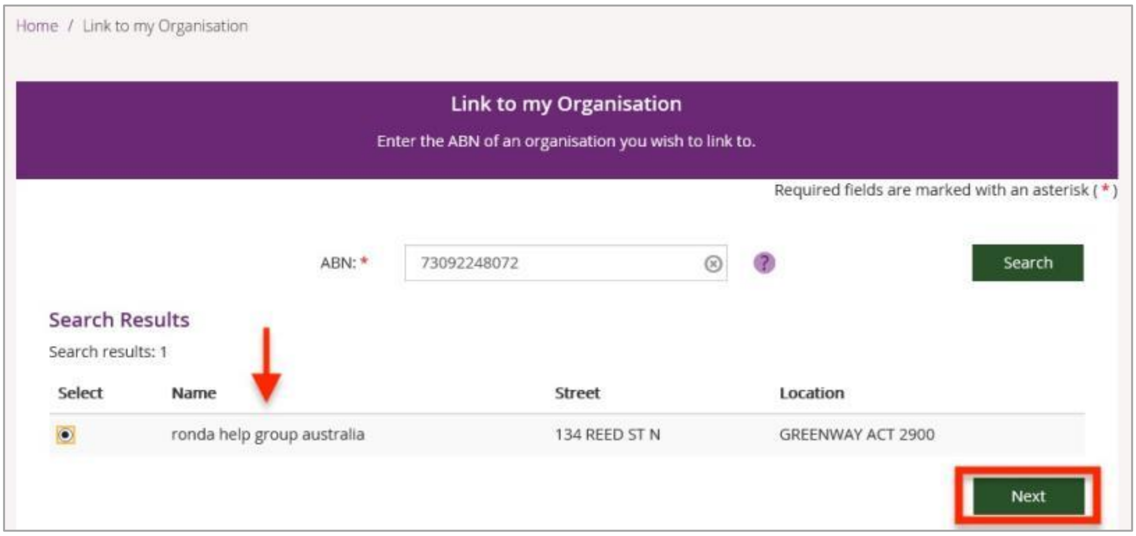
1. Select the **Link to my Organisation** tile on the **myplace** home page.



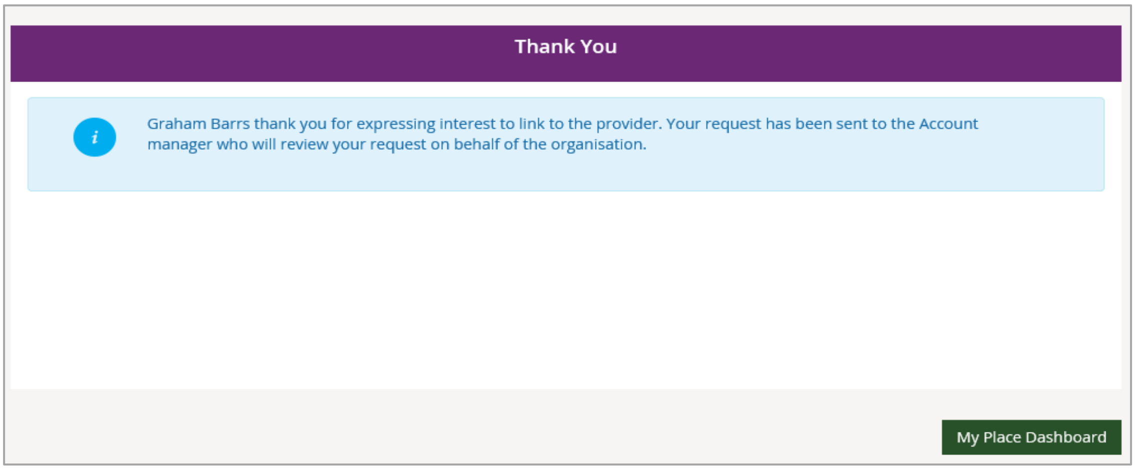
2. Enter the ABN (11 digits, no spaces) of the provider to which you wish to link and select **Search**.



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.