NDIS myplace portal

Step-by-step guide

My payment request

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 – My payment request:

- Updated instructions on who can cancel a payment request that is paid or pending (page 10)
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.
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.

![Confirmation Screen]

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.

![My Place Portal]

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.

![Payment Request Screen](image)

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.

![Search Results](image)
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.

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### 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.

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.

The Feedback Form opens.
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.

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.