

NDIS myplace provider portal

Step-by-step guide

December 2021

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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 December 2021:

- Updated the minimum browser requirements (page 5)
- Updated text in the Profile chapter (page 29)
- Updated text in My Organisation Details (page 31, 33 and 34)
- Updated NDIS Pricing Arrangements and Price Limit text (pages 54 and 94)
- Updated SIL guidance (page 55)
- Updated Note text (page 63)
- Included Create a payment request for an irregular SIL support instructions (pages 95 to 100)

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 your NDIS (National Disability Insurance Scheme) registration details including updates to registration groups and professions
- 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
- View Support Coordination Requests for Service and action these requests
- Upload required documents
- Submit and review enquiries or complaints
- Download reports about all your service bookings and participants.

Minimum internet browser requirements

To access **myplace**, there are minimum browser requirements. These are:

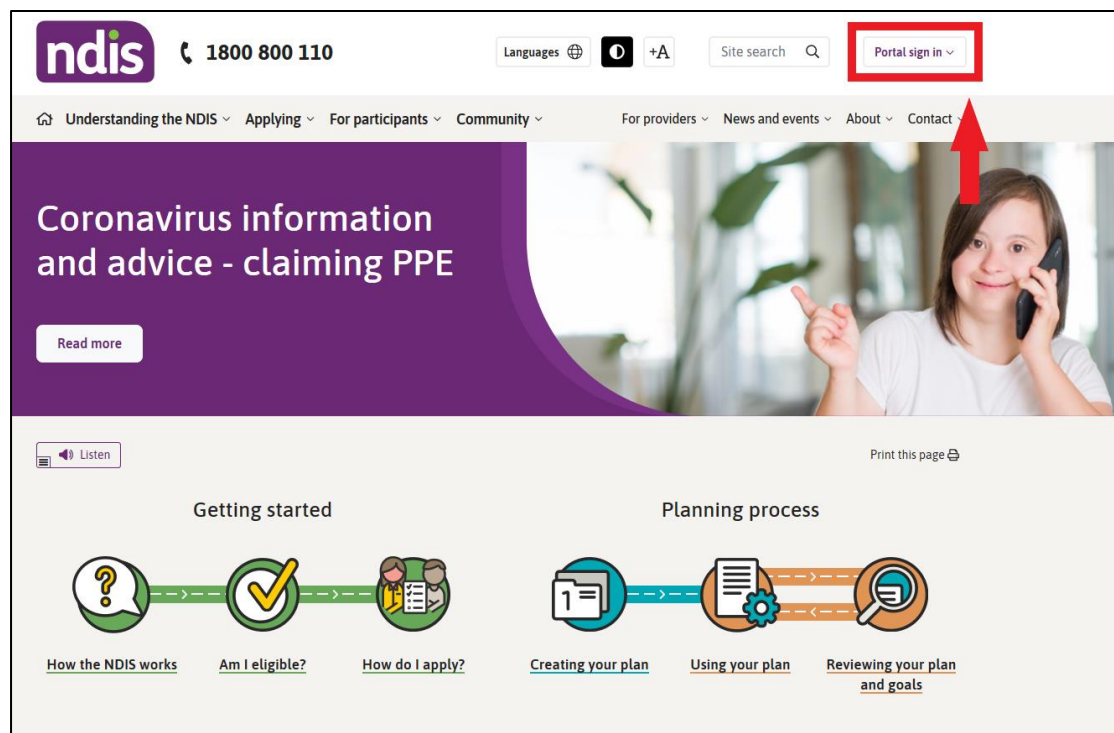
- Google Chrome
- Microsoft Internet Explorer 11 on Windows 8.1 or Windows 10
- Microsoft Edge
- Mozilla Firefox
- Safari on Mac OS X

How to contact NDIS

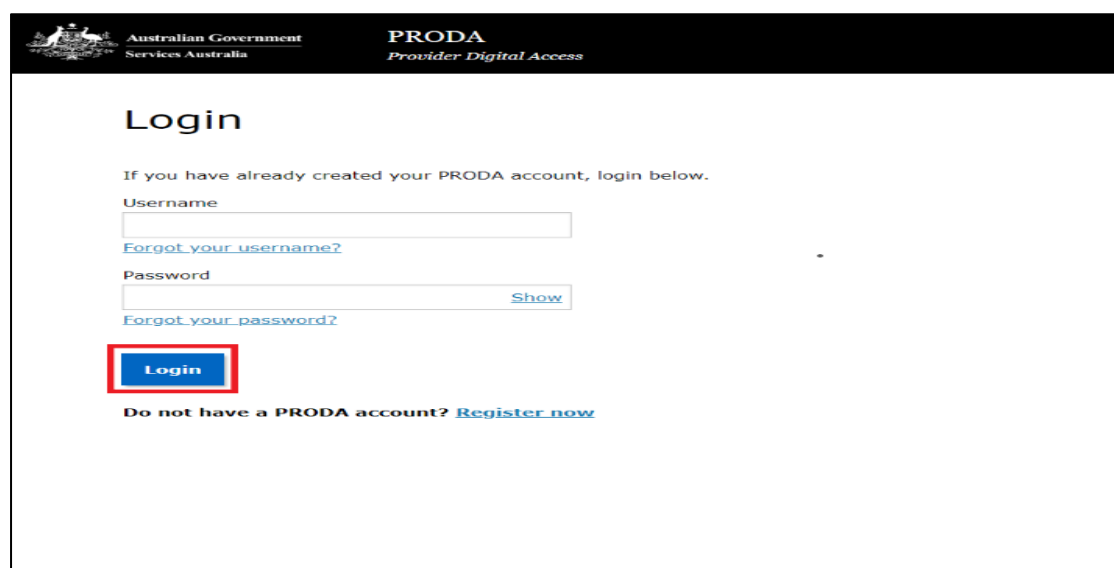
| Contact the NDIS by | | |
|--|---|--|
|  <p>NDIS Webchat</p> <p>You can live chat with us about:</p> <ul style="list-style-type: none"> • myplace provider portal • Service bookings • Payment requests • Quotes • Referrals • Request for service • Searching for a register provider |  <p>Phone</p> <p>1800 800 110</p> <p>You can call us about:</p> <ul style="list-style-type: none"> • 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 |  <p>provider portal</p> <p>You can use the provider portal to:</p> <ul style="list-style-type: none"> • Submit a payment enquiry • Submit a general enquiry, feedback, compliment or a complaint • Search for a provider • Upload documents |
|  <p>Email us</p> <p>enquiries@ndis.gov.au</p> <p>You can email us about :</p> <ul style="list-style-type: none"> • Submit a general enquiry, feedback, compliment or complaint • Email a document, form report or letter |  <p>Contact and Feedback form</p> <p>NDIS Online Form</p> <p>You can use the Online form to:</p> <ul style="list-style-type: none"> • Submit a general enquiry, feedback, compliment or a complaint • Request a callback |  <p>Mailing address</p> <p>National Disability Insurance Agency GPO Box 700 Canberra ACT 2601</p> <p>You can mail us to:</p> <ul style="list-style-type: none"> • Send a compliment, complaint or provide feedback, • Document, form, report or letter |

Accessing myplace

1. Access the **myplace** portal using the link provided on the [NDIS website](https://www.ndis.gov.au) 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**.



3. If you do not have a PRODA (Provider Digital Access) account, please refer to the PRODA - Step-by-step guide found on the [NDIS website](#).

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 on the [NDIS website](#).

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.

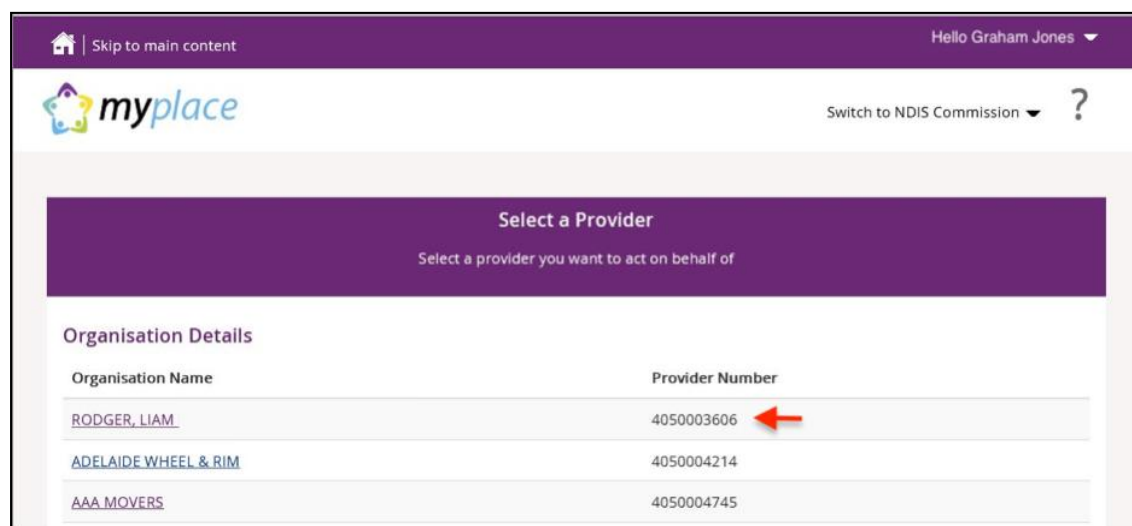
Note: The provider number may also be referred to as Business Partner Number (BPN).

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**.

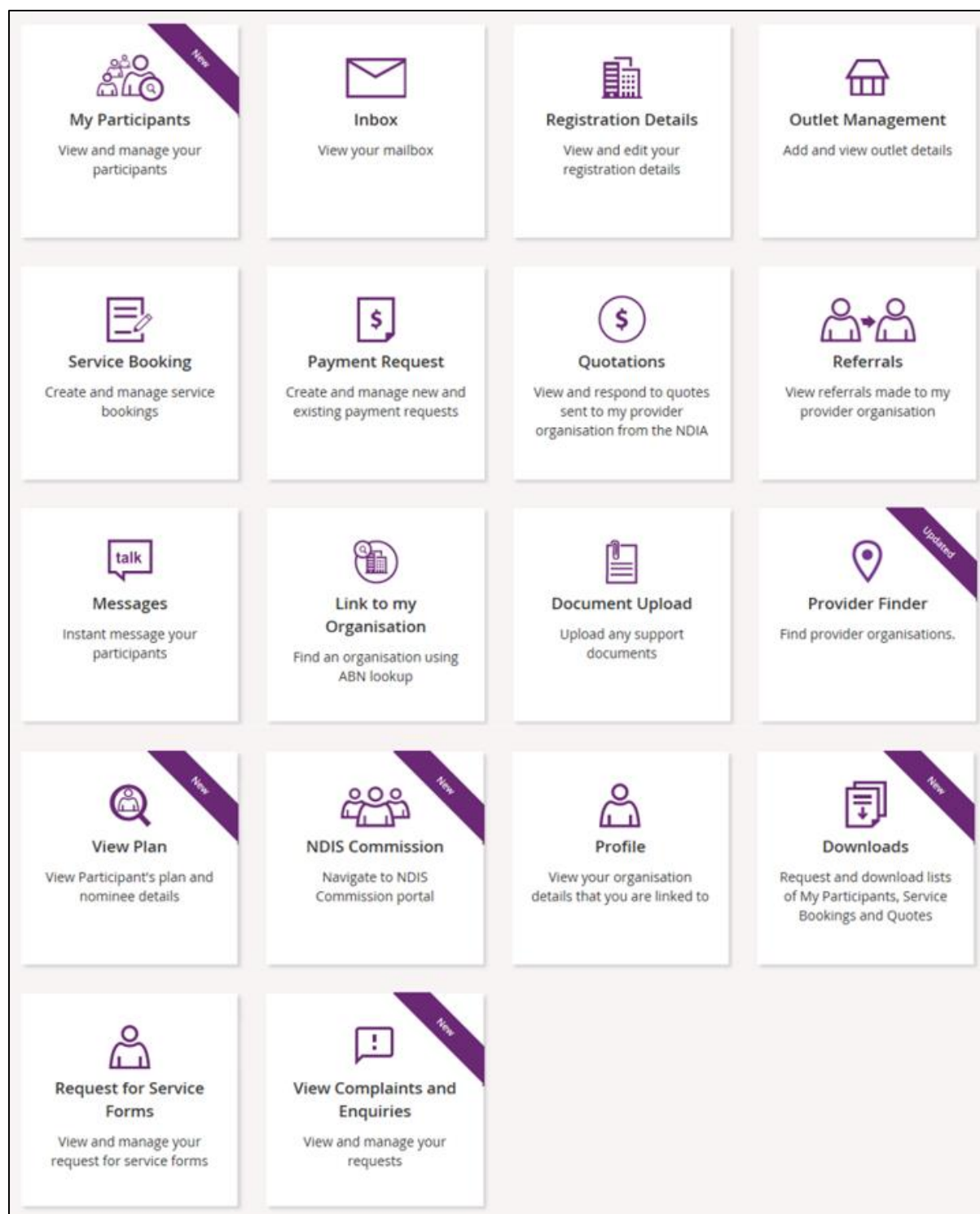


| Organisation Name | Provider Number |
|--|-----------------|
| RODGER, LIAM | 4050003606 |
| ADELAIDE WHEEL & RIM | 4050004214 |
| AAA MOVERS | 4050004745 |






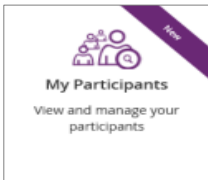
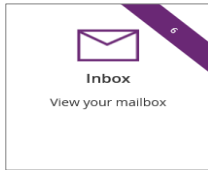
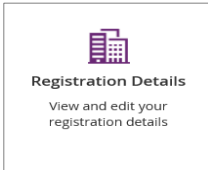
The **myplace** home page displays.









myplace Portal home page

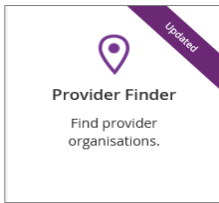
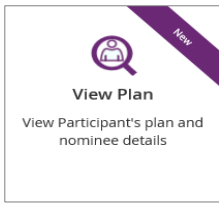

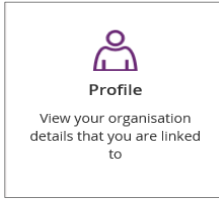
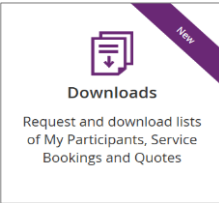
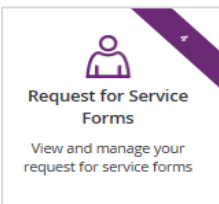
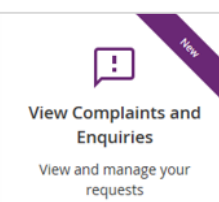
The **myplace** home page contains a number of separate sections or functions.



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>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 drop-down 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 your registration details</p> |

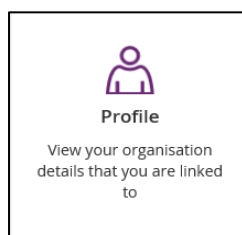
| myplace section | Function |
|--|---|
|  <p>Outlet Management Add and view outlet details</p> | View your organisation's outlet details. |
|  <p>Service Booking Create and manage service bookings</p> | Create and manage service bookings with participants. |
|  <p>Payment Request Create and manage new 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. |
|  <p>Upload Evidence Document Upload</p> | Upload required documents. |

| myplace section | Function |
|--|--|
|  <p>Provider Finder Find provider organisations.</p> | Search for providers within a certain location. |
|  <p>View Plan View Participant's plan and nominee details</p> | View plan details when granted consent by a participant. |
|  <p>NDIS Commission Navigate to NDIS Commission portal</p> | Navigate to the NDIS Commission portal. |
|  <p>Profile View your organisation details that you are linked to</p> | View and edit information and contact details for yourself and your organisation. |
|  <p>Downloads Request and download lists of My Participants, Service Bookings and Quotes</p> | Request and download service bookings information, quotes, or information for participants regarding their active service bookings |
|  <p>Request for Service Forms View and manage your request for service forms</p> | View and action Support Coordination Requests for Service Forms. |
|  <p>View Complaints and Enquiries View and manage your requests</p> | Submit complaints, feedback, enquiries, payment enquiries and compliments. |

Provider portal navigation

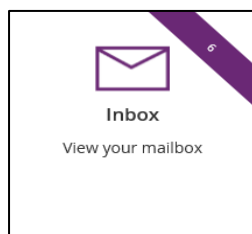
Using a function

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.

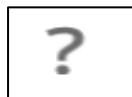


3. Select the **Home** link in the breadcrumb trail below the **myplace** logo.

Help and feedback

Getting 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**.

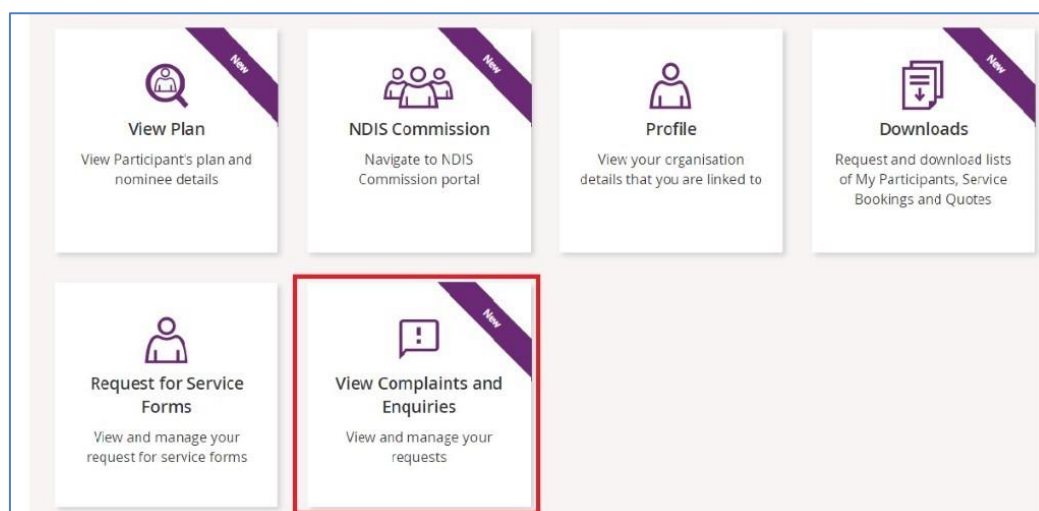
Submit payment enquiries, complaints, compliments, feedback and other enquiries

The **View Complaints and Enquiries** tile provides you with the options you need to submit:

- a payment enquiry
- complaints, compliments and other feedback
- any additional enquiries.

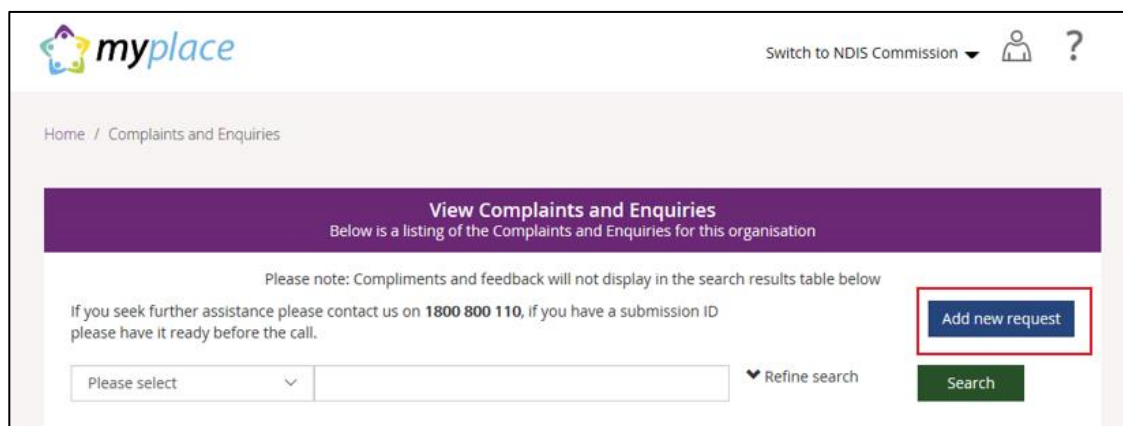
To access these functions:

1. Go to the **myplace** home page and select the **View Complaints and Enquiries** tile.



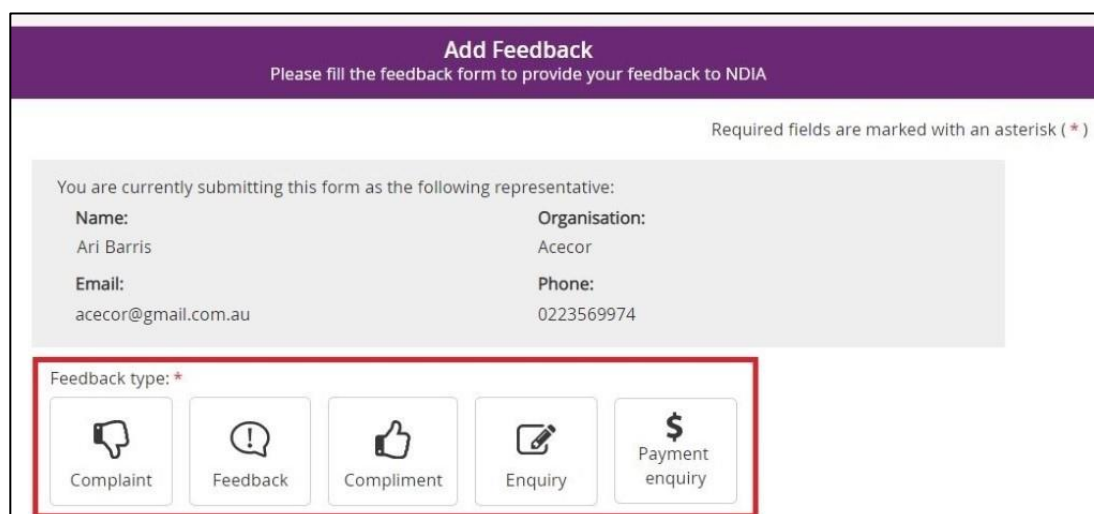
Note: You can also access the options you need by selecting the **Feedback** link in the page footer.

2. On the **View Complaints and Enquiries** page, select **Add new request**.



3. The **Add Feedback** page will appear with your name, organisation name, registered business email address and phone details displayed.

On the **Add Feedback** page, use the **Feedback type** options to select the type of request you will be making.

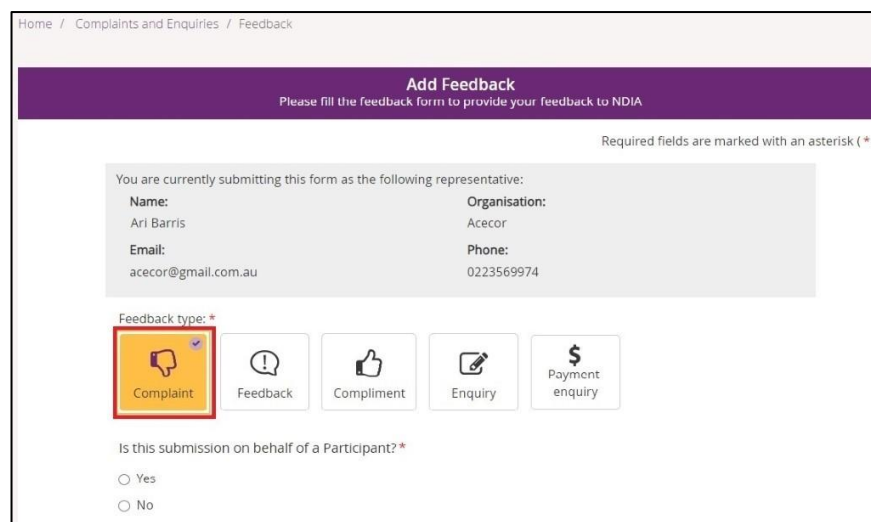


You can choose to:

- [Submit a complaint](#)
- [Send feedback or a compliment](#)
- [Submit an enquiry](#)
- [Submit a payment enquiry](#).

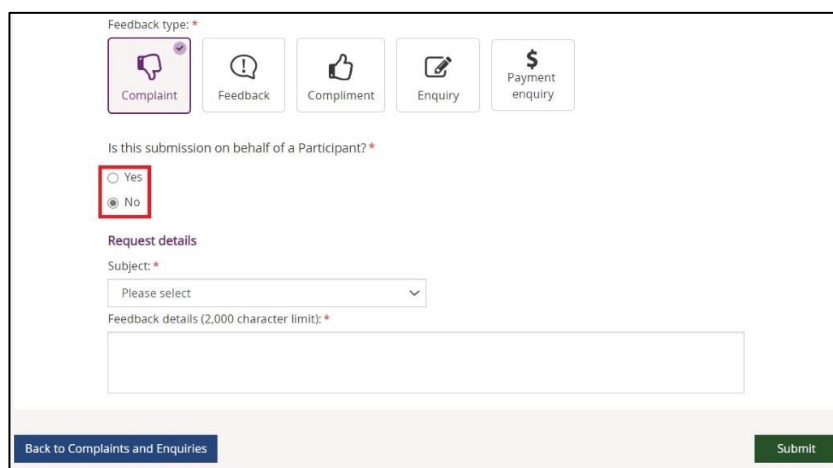
Submit a complaint

1. Select **Complaint**.



2. Select whether this complaint is on behalf of a participant.

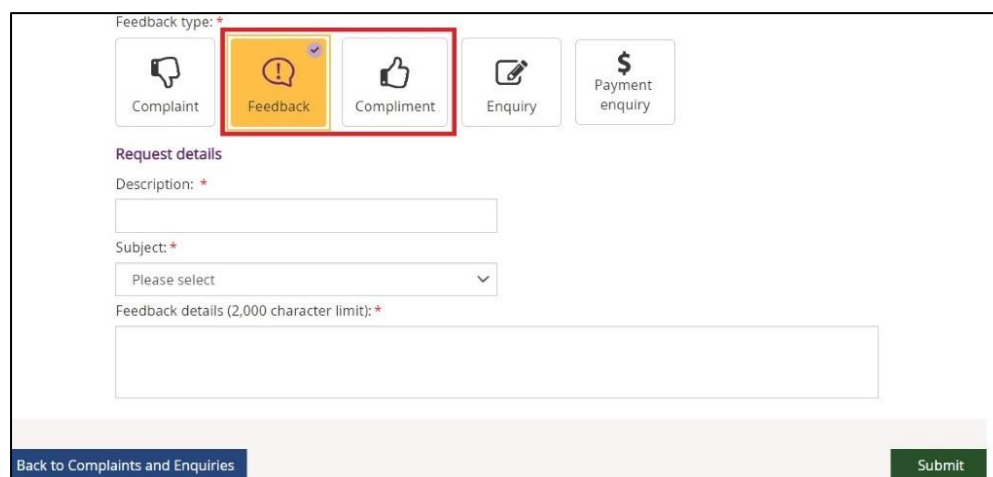
- If a complaint is submitted on behalf of a participant select **Yes**. Then enter the participant's NDIS number, last name and date of birth and select **Verify participant**.
- If the complaint is not on behalf of a participant select **No**.



3. In the **Subject** field, choose the subject that relates to your complaint from the drop-down list.
4. In the **Feedback details** field, enter a description of your complaint. This field has a 2000-character limit.
5. Select **Submit** to send your complaint to the NDIA.

Send feedback or a compliment

1. Select **Feedback** or **Compliment**.

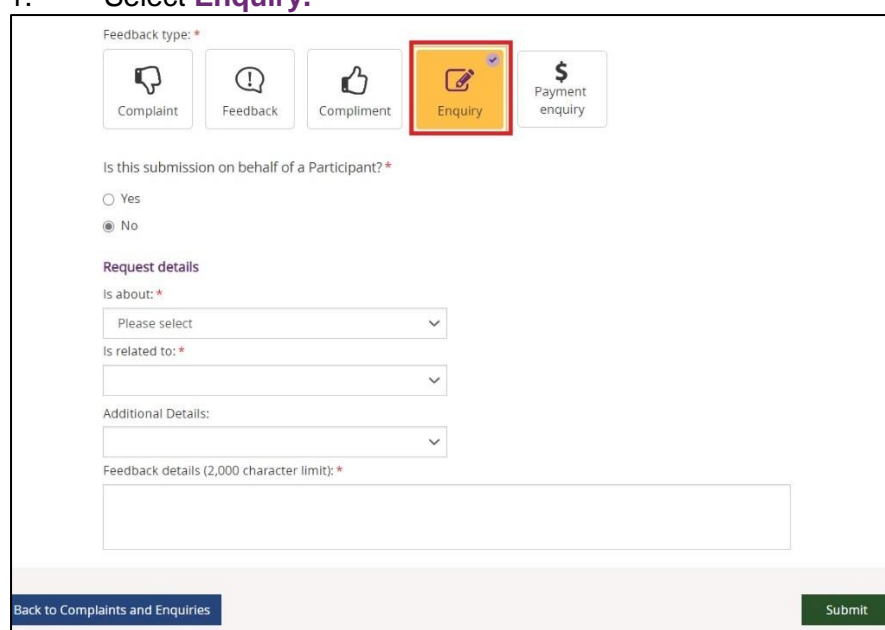


The screenshot shows the 'Feedback type' selection screen. At the top, there are five buttons: 'Complaint' (speech bubble icon), 'Feedback' (speech bubble with exclamation mark icon, highlighted with a red box), 'Compliment' (thumbs up icon), 'Enquiry' (pencil icon), and 'Payment enquiry' (dollar sign icon). Below these buttons is the 'Request details' section, which includes a 'Description' text field, a 'Subject' dropdown menu with 'Please select' as the current selection, and a 'Feedback details (2,000 character limit)' text area. At the bottom of the form are two buttons: 'Back to Complaints and Enquiries' and 'Submit'.

2. In the **Description** field, provide a brief description of your feedback or compliment.
3. From the **Subject** drop-down, select the subject that relates to your feedback.
4. In the **Feedback details** field, enter a description of the feedback. This field has a 2000-character limit.
5. Select **Submit** to send your feedback to the NDIA.

Submit an enquiry

1. Select **Enquiry**.



The screenshot shows the 'Enquiry' selection screen. At the top, there are five buttons: 'Complaint' (speech bubble icon), 'Feedback' (speech bubble with exclamation mark icon), 'Compliment' (thumbs up icon), 'Enquiry' (pencil icon, highlighted with a red box), and 'Payment enquiry' (dollar sign icon). Below these buttons is a section titled 'Is this submission on behalf of a Participant?' with two radio buttons: 'Yes' and 'No' (selected). Below this is the 'Request details' section, which includes an 'Is about:' dropdown menu with 'Please select' as the current selection, an 'Is related to:' dropdown menu with 'Please select' as the current selection, and an 'Additional Details:' dropdown menu with 'Please select' as the current selection. At the bottom of the form is a 'Feedback details (2,000 character limit)' text area. At the bottom of the form are two buttons: 'Back to Complaints and Enquiries' and 'Submit'.

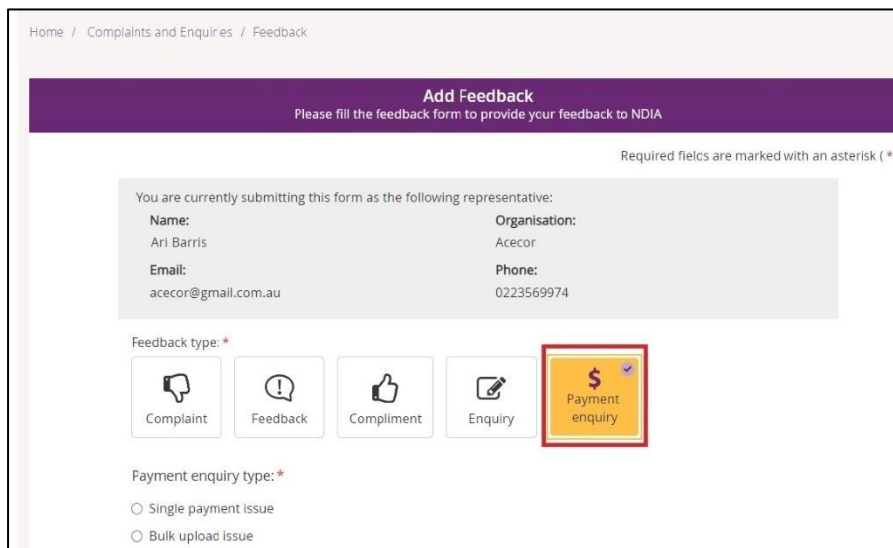
2. Select whether this enquiry is on behalf of a participant.
 - If an enquiry is submitted on behalf of a participant select **Yes**. Then enter the participant's NDIS number, last name and date of birth and select **Verify participant**.
 - If the enquiry is not on behalf of a participant select **No**.
3. In the **Is about** field, select the area that your enquiry is about from the drop-down list.
NOTE: This drop-down selection is mandatory to submit your enquiry.
4. In the **Is related to** field, select the area that your enquiry is about from the drop-down list. The available items are related to your previous drop-down selection made from the **Is about**. This drop-down is also a mandatory selection for your enquiry.
5. In **Additional Details**, select an item that matches additional detail from the drop-down list. The available items are related to your previous drop-down selection made from **Is related to**. This selection is **not** a mandatory item to submit your enquiry.
6. In **Feedback details**, enter a description of your enquiry. This field has a 2000 character limit.
7. Select **Submit** to send your enquiry to the NDIA.

Submit a payment enquiry

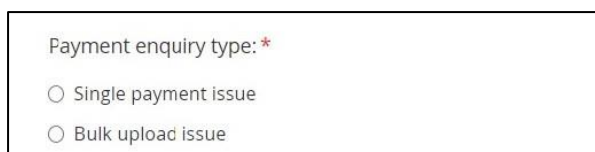
There are two methods to submit a payment enquiry on behalf of your organisation: as a new payment enquiry, or by linking to an existing payment request.

Submit a new payment enquiry

1. Select **Payment Enquiry**.



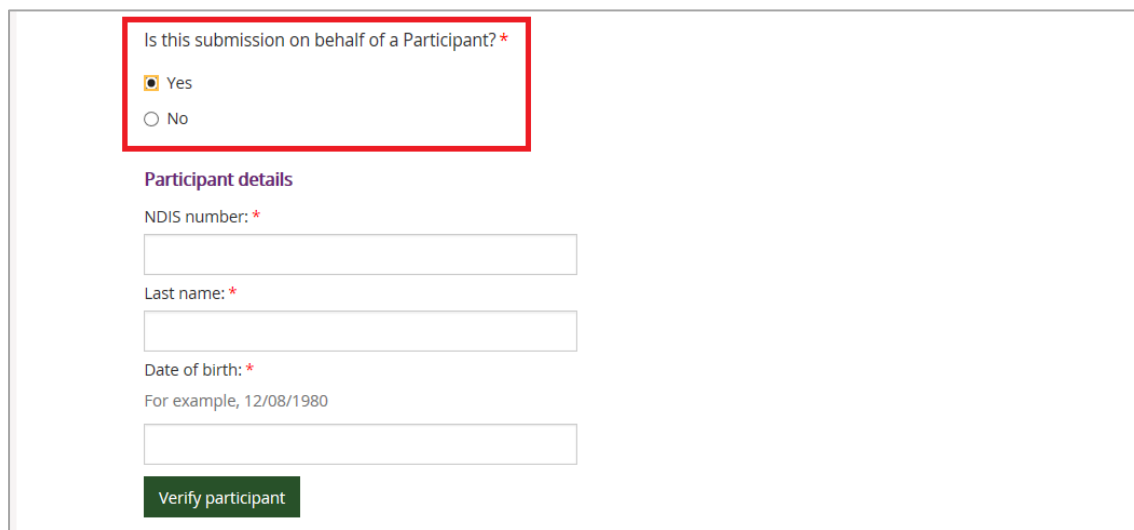
2. Select the payment enquiry type: **Single payment issue** or **Bulk Upload Issue**.



Note: if you select **Bulk Upload Issue** then you will need to attach the document relating to the relevant bulk upload. This is a mandatory requirement of the **Bulk Upload issue** process.

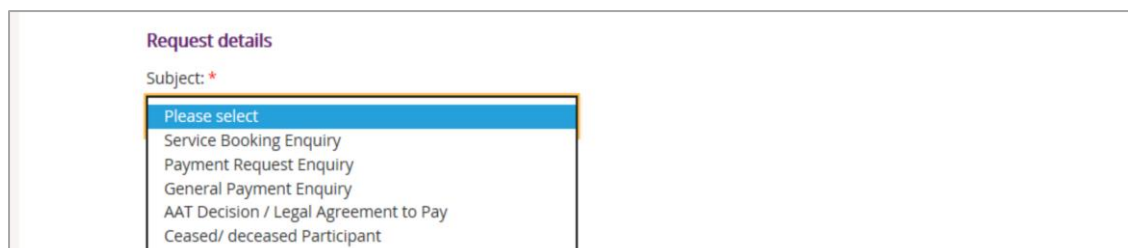
3. Select whether the enquiry is on behalf of a participant.

- If the enquiry is not on behalf of a participant select **No**.
- If the enquiry is submitted on behalf of a participant select **Yes**. Then enter the participant's NDIS number, last name and date of birth and select **Verify Participant**.



4. From the **Request details** drop-down, choose the subject that relates to your enquiry:

- ☐ Service Booking Enquiry
- ☐ Payment Request Enquiry
- ☐ General Payment Enquiry
- ☐ AAT Decision / Legal Agreement to Pay
- ☐ Ceased / deceased Participant



5. Select whether you have a service booking number.

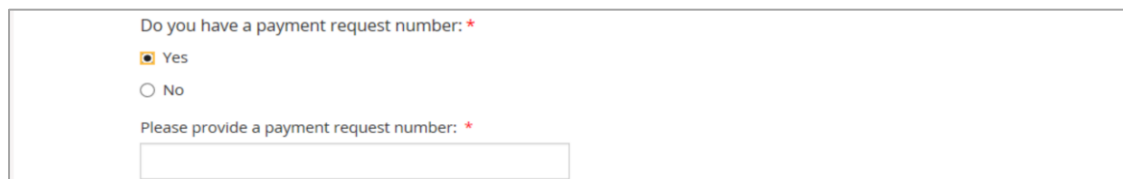
- ☐ If not, select **No**.
- ☐ If there is a service booking number, select **Yes** and enter the service booking number.



Select whether you have a payment request number.

- ☐ If not, select **No**.

- If there is a payment request number, select **Yes** and enter the payment request number.



Do you have a payment request number: *

☒ Yes

☐ No

Please provide a payment request number: *

6. Select whether there is any amount involved in the enquiry.

- If not, select **No**.
- If there is, select **Yes** and enter the amount in dollars and cents. **Do not** include \$ (dollar sign) as you will get an error message when submitting the payment enquiry.



Is there any amount involved in the enquiry: *

☒ Yes

☐ No

Please specify the amount: *

7. In the **Feedback details** field, enter a description of your enquiry. This field has a 2000-character limit.

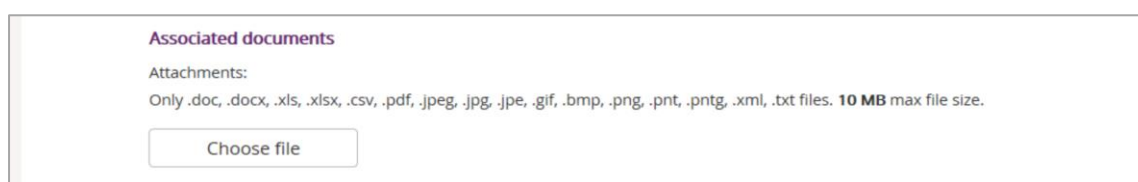


Feedback details (2,000 character limit): *

8. If there are associated document, select **Choose file** to attach them. You can attach documents in .doc, .docx, .xls, .xlsx, .csv, .pdf, .jpeg, .jpg, .jpe, .gif, .bmp, .png, .pnt, .pntg, .xml, .txt format.

The file must be no larger than 10MB each. Up to 10 files may be uploaded.

Remember to attach any required supporting documents such as invoices before you select submit, as you won't be able to add these after you submit your enquiry.



Associated documents

Attachments:

Only .doc, .docx, .xls, .xlsx, .csv, .pdf, .jpeg, .jpg, .jpe, .gif, .bmp, .png, .pnt, .pntg, .xml, .txt files. **10 MB** max file size.

9. Select what you would like to do with this payment issue.

- **Submit and create another payment enquiry with participant information**
 - This will allow you to create a new payment enquiry for the same participant using the existing participant information.

- **Submit and create new payment enquiry** – You will return to the payment enquiry screen so that you are able to immediately enter a new enquiry.

Or

- **Submit this payment enquiry** – To submit your payment enquiry and provide you with details including the payment enquiry reference number.

What would you like to do with this payment issue? *

☐ Submit and create another payment issue with participant information
☐ Submit and create new payment issue
☐ Submit this payment issue

[Back to Complaints and Enquiries](#)
[Submit](#)

A list of your organisation's submitted payment enquiries will display on the **View complaints and enquiries** page.

View Complaints and Enquiries

Below is a listing of the Complaints and Enquiries for this organisation

Please note: Compliments and feedback will not display in the search results table below

If you seek further assistance please contact us on **1800 800 110**, if you have a submission ID please have it ready before the call.

▼ Refine search

Search results

Showing 1 - 10 of 22 results

Sort by

| Submission ID | Type of submission | Status | Submitted by | Participant name (NDIS number) | Date submitted |
|----------------------------|--------------------|-----------|--------------|--------------------------------|----------------|
| 8100000000 | Payment Enquiry | Submitted | Name | | 23/03/2020 |
| 8100000000 | Payment Enquiry | Submitted | Name | | 23/03/2020 |
| 8100000000 | Payment Enquiry | Submitted | Name | | 23/03/2020 |
| 8100000000 | Payment Enquiry | Submitted | Name | Name (000000000) | 23/03/2020 |

One of three statuses will be displayed in the **Status** column:

Submitted – Your enquiry has been submitted and will be reviewed by NDIA.

In Progress – Your enquiry is under review by NDIA.

Closed – Your enquiry has been completed. You may need to submit a new enquiry to provide more information.

Raise a payment enquiry from an existing payment request

1. From the home page select the **Payment Request** tile.

Find

Search for Payment Requests

Required fields are marked with an asterisk (*)

View By: * Please select

Reset Search

| Payment Request Number | Invoice Number | Participant Name (NDIS Number) | Support Budget | Submitted Date | Support Start Date | Support End Date | Status |
|---|----------------|--------------------------------|----------------|----------------|--------------------|------------------|--------|
| <div>First Prev Page 1 of 1 Next Last</div> | | | | | | | |

Back

\$

Payment Request

Create and manage new and existing payment requests

2. Select the View Payment Request tile

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

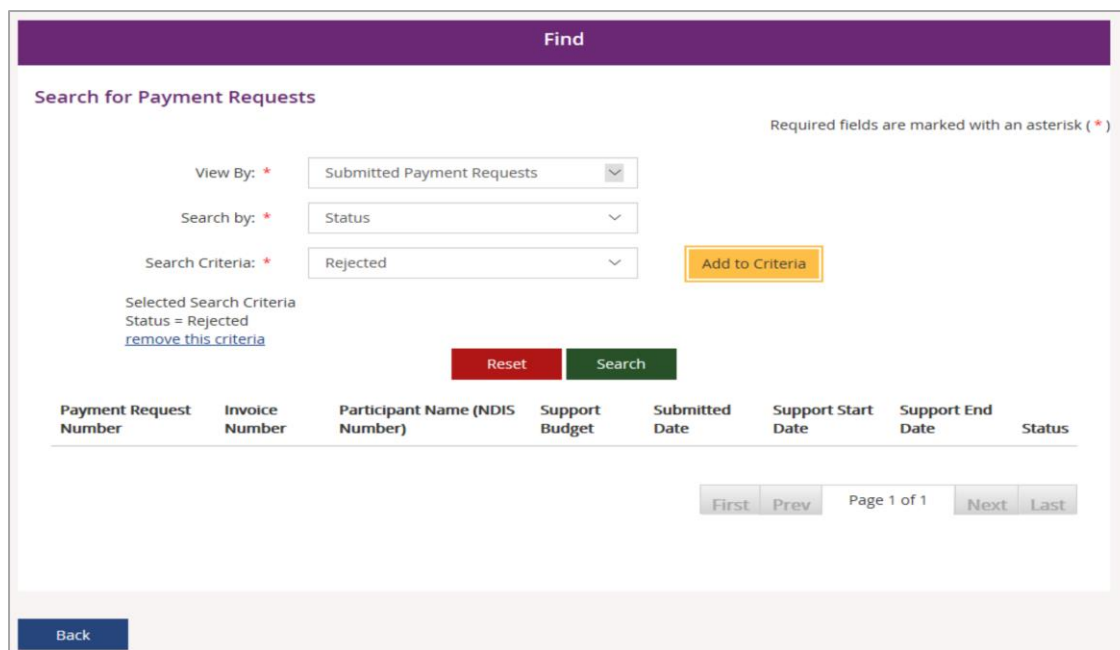
3. View By - Select search criteria from the drop-down menu:

- Submitted Payment Requests
- Uploaded Bulk Payment File

4. Search By - Select search criteria from the drop-down menu:

- NDIS Number
- Payment Request Number
- Status
- Support Item Number
- Submitted Date
- Support Start Date
- Support End Date

- Your Invoice Number



Find

Search for Payment Requests

Required fields are marked with an asterisk (*)

View By: * Submitted Payment Requests

Search by: * Status

Search Criteria: * Rejected [Add to Criteria](#)

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

[Reset](#) [Search](#)

| 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](#)

5. **Search Criteria** - Select from the drop-down menu:

- Rejected
- Incomplete
- Pending Payment
- Paid
- Cancelled
- Awaiting Approval

6. Select Add to Criteria.

Find

Search for Payment Requests

Required fields are marked with an asterisk (*)

View By: *

Submitted Payment Requests

Search by: *

Status

Search Criteria: *

Rejected

Add to Criteria

Selected Search Criteria

Status = Rejected

[remove this criteria](#)

Reset

Search

| 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

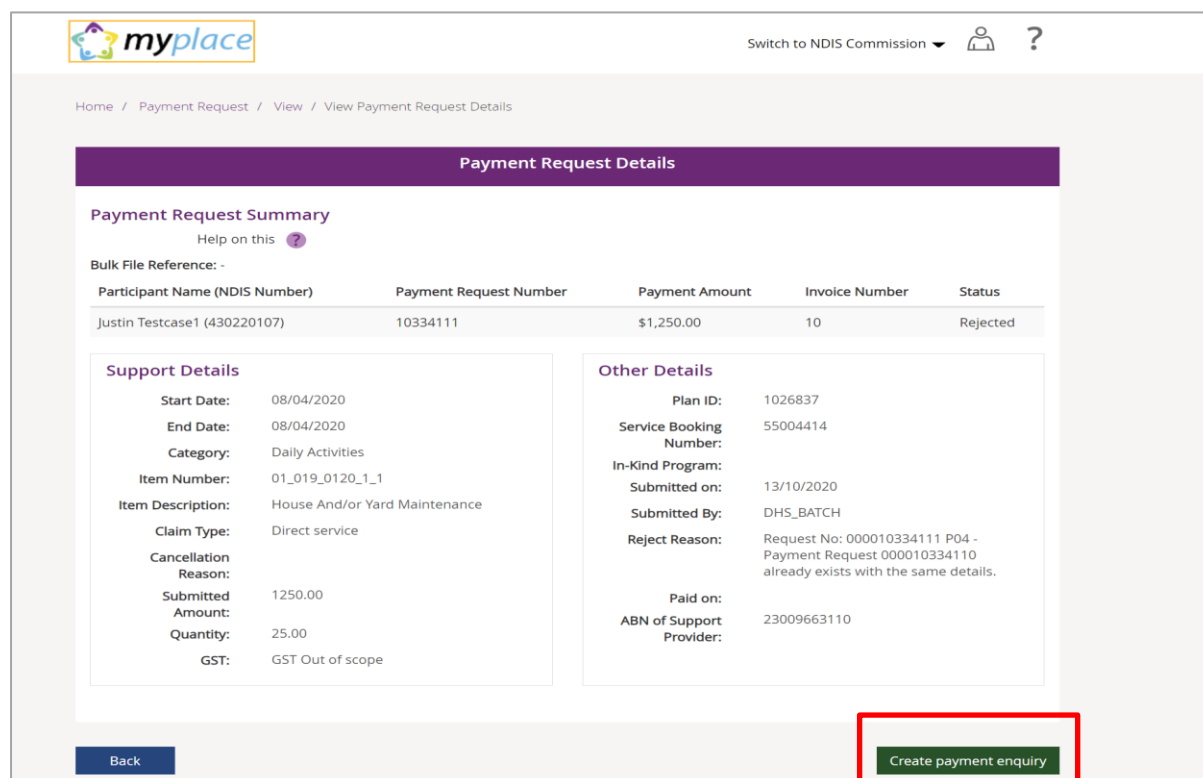
Next

Last

Back

7. Select **Search**.

From the display results, select the relevant payment request and the payment request will display. To add a new enquiry select **Create payment enquiry**.



myplace

Switch to NDIS Commission

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 |
|--------------------------------|------------------------|----------------|----------------|----------|
| Justin Testcase1 (430220107) | 10334111 | \$1,250.00 | 10 | Rejected |

Support Details

Start Date: 08/04/2020

End Date: 08/04/2020

Category: Daily Activities

Item Number: 01_019_0120_1_1

Item Description: House And/or Yard Maintenance

Claim Type: Direct service

Cancellation Reason:

Submitted Amount: 1250.00

Quantity: 25.00

GST: GST Out of scope

Other Details

Plan ID: 1026837

Service Booking Number: 55004414

In-Kind Program:

Submitted on: 13/10/2020

Submitted By: DHS_BATCH

Reject Reason: Request No: 000010334111 P04 - Payment Request 000010334110 already exists with the same details.

Paid on:

ABN of Support Provider: 23009663110

Back

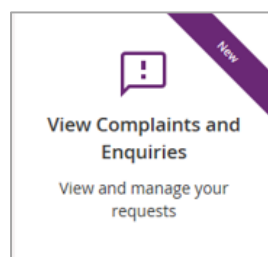
Create payment enquiry

Complete the steps from [Submit a new payment enquiry](#) to complete your payment enquiry.

Note: Some information will prepopulate, based on the existing payment request data.

View existing complaints and enquiries

1. Select the **View Complaints and Enquiries** tile on the myplace home page.



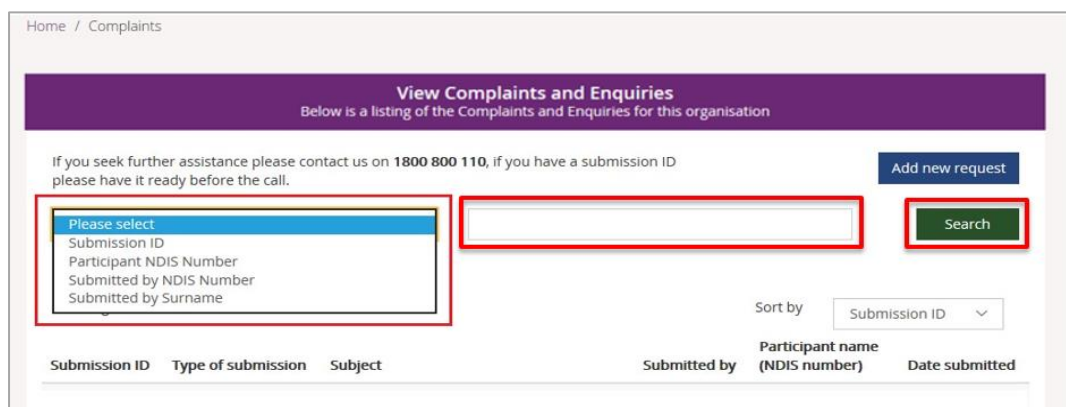
2. The **View Complaints and Enquiries** page displays your submitted complaints and enquiries. complaints and enquiries. Use **Next** and **Previous** to navigate through lists that have more than 10 entries.

Note: For information about previously submitted compliments, payment enquiries or feedback, call NDIA on 1800 800 110.

3. Next to the free text search field, use the drop-down selection to choose the criteria of the search:

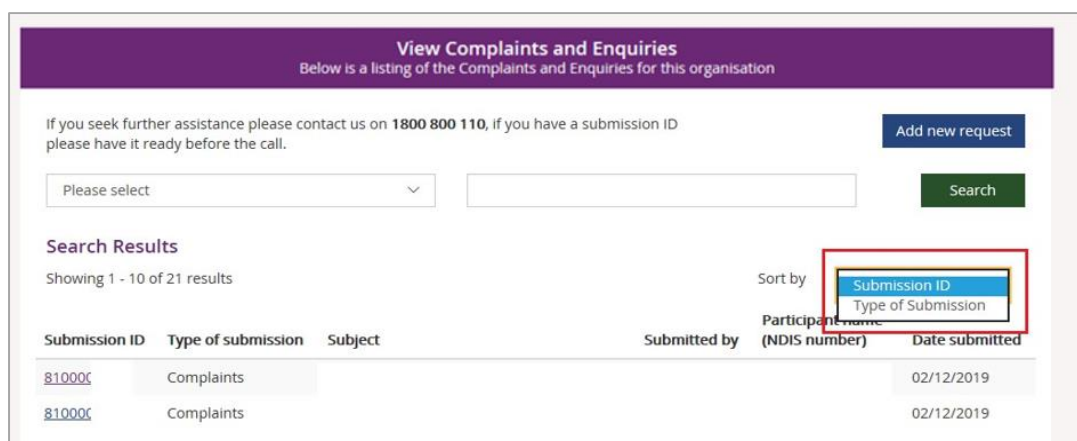
- **Submission ID**
- **Participant NDIS number**
- **Submitted by NDIS number**
- **Submitted by Surname.**

4. Enter the details of the complaint or enquiry in the search box and select **Search**.

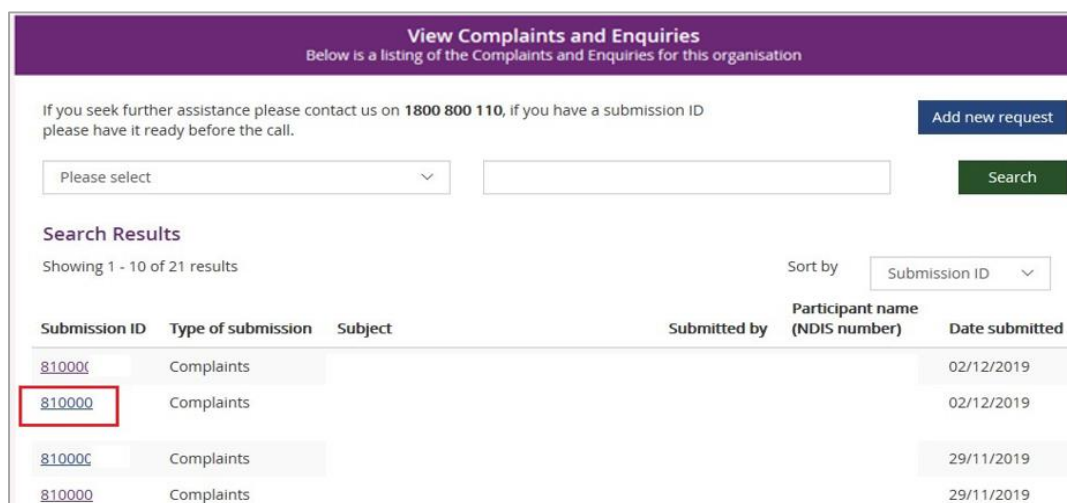


5. From the **Sort By** drop-down, select a sorting option:

- **Submission ID**
- **Type of Submission**



6. To view the details of the **complaint** or **enquiry** select the **Submission ID** (hyperlinked)



View Complaints and Enquiries
Below is a listing of the Complaints and Enquiries for this organisation

If you seek further assistance please contact us on **1800 800 110**, if you have a submission ID please have it ready before the call.

[Add new request](#)

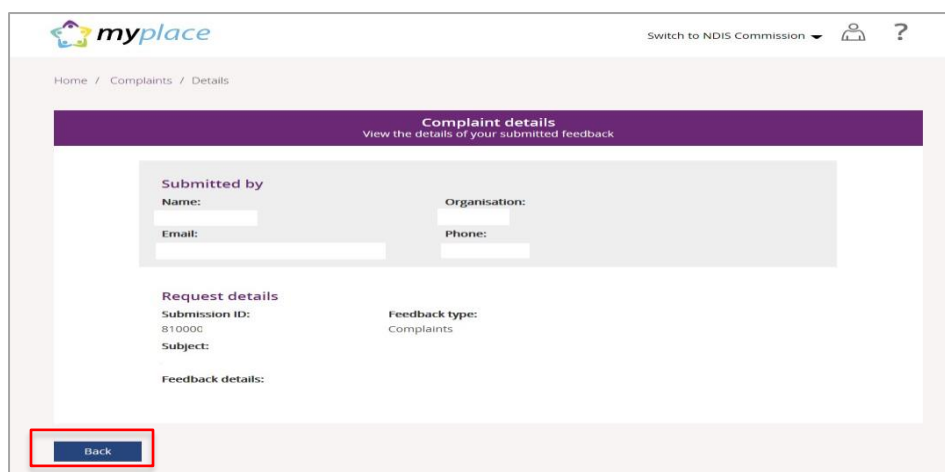
Please select



Search Results
Showing 1 - 10 of 21 results

Sort by

| Submission ID | Type of submission | Subject | Submitted by | Participant name (NDIS number) | Date submitted |
|------------------------|--------------------|---------|--------------|--------------------------------|----------------|
| 810000 | Complaints | | | | 02/12/2019 |
| 810000 | Complaints | | | | 02/12/2019 |
| 810000 | Complaints | | | | 29/11/2019 |
| 810000 | Complaints | | | | 29/11/2019 |

The details of the complaint or enquiry will be displayed.



myplace [Switch to NDIS Commission](#)  

[Home](#) / [Complaints](#) / [Details](#)

Complaint details
View the details of your submitted feedback

Submitted by

Name: Organisation:
Email: Phone:

Request details

Submission ID: 810000
Subject:

Feedback type:
Complaints

Feedback details:

[Back](#)

7. Select **Back** (bottom left corner of the page) to return to the **search results**.

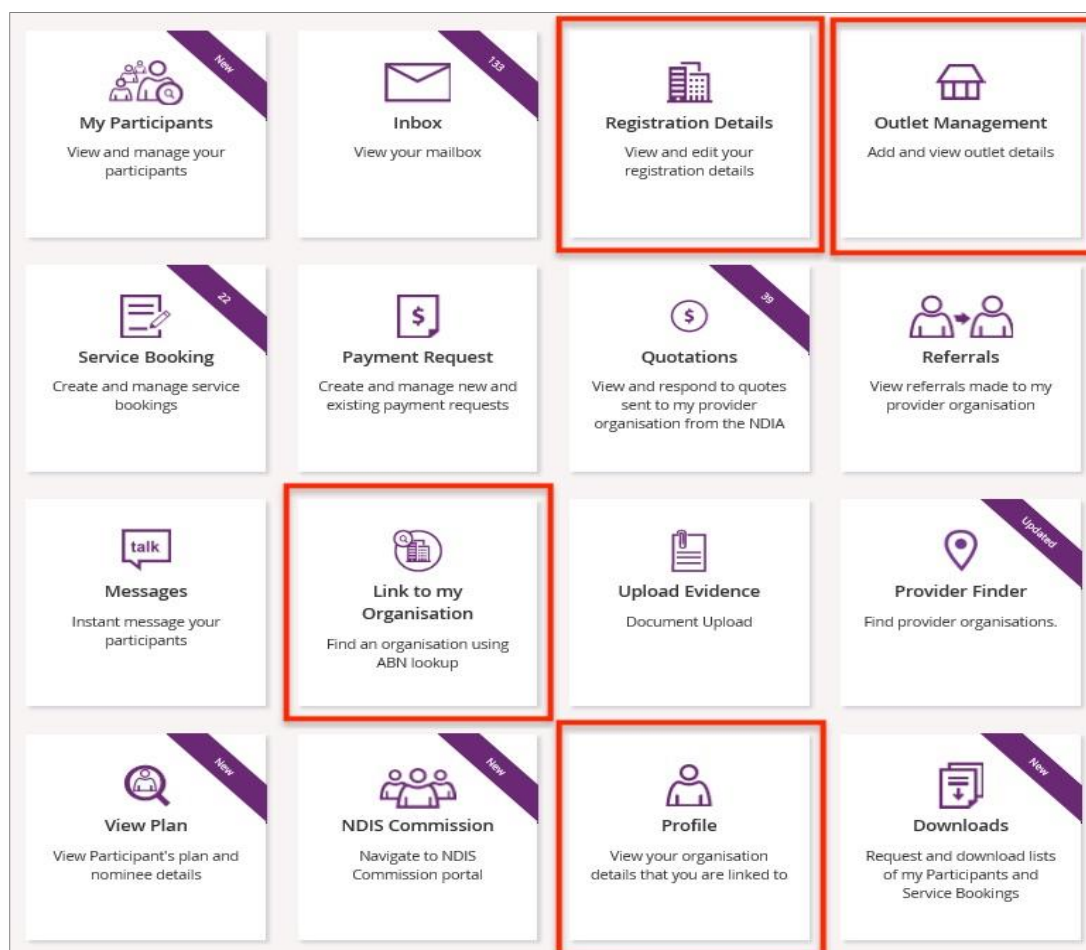
Maintaining your information

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). You need to register and maintain your registration details and registration groups with 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.

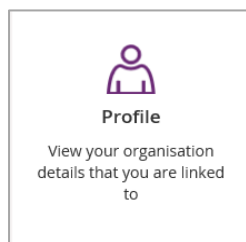
Manage the organisations which **Link to my Organisation** (the organisations you work for).



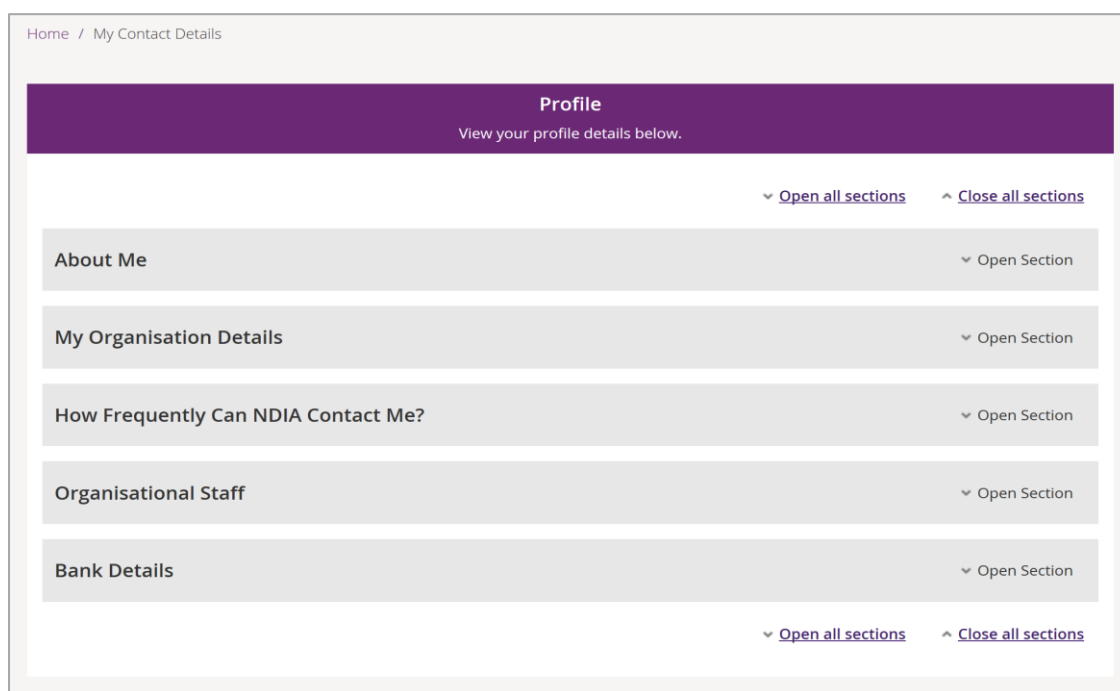
Profile

This allows you to view and update your personal details, and view (and update if you are the account manager for your organisation) the Provider Finder Display in 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.

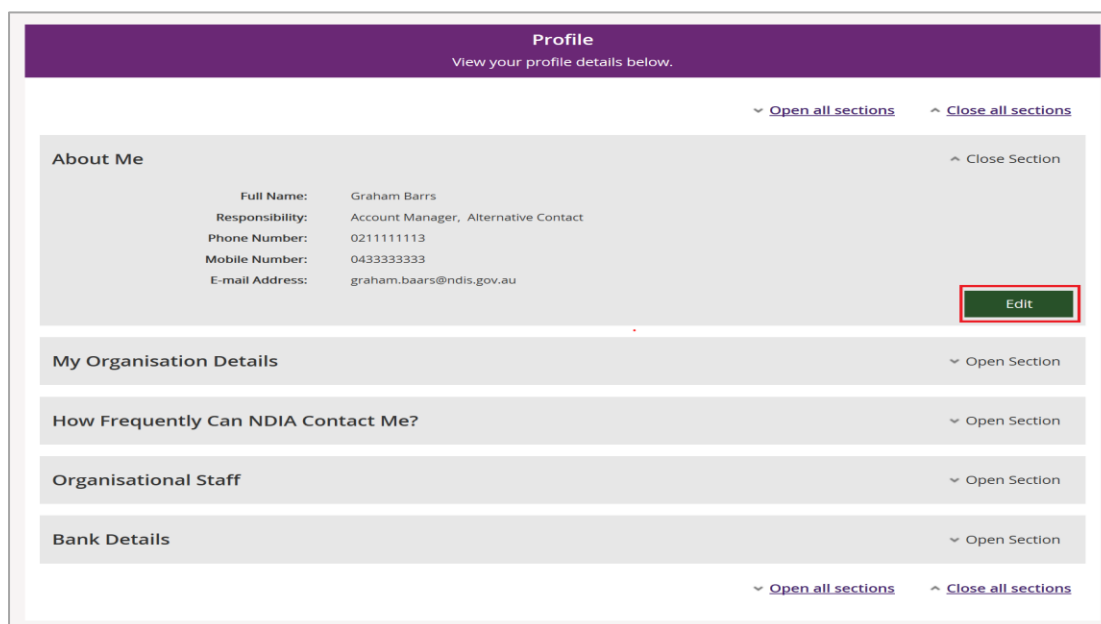


2. The **Profile** page displays. Use the **Open** and **Close** section buttons to see all the information.



About me

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



Profile
View your profile details below.

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

About Me ▲ [Close Section](#)

Full Name: Graham Barrs
Responsibility: Account Manager, Alternative Contact
Phone Number: 0211111113
Mobile Number: 0433333333
E-mail Address: graham.baars@ndis.gov.au

Edit

My Organisation Details ▼ [Open Section](#)

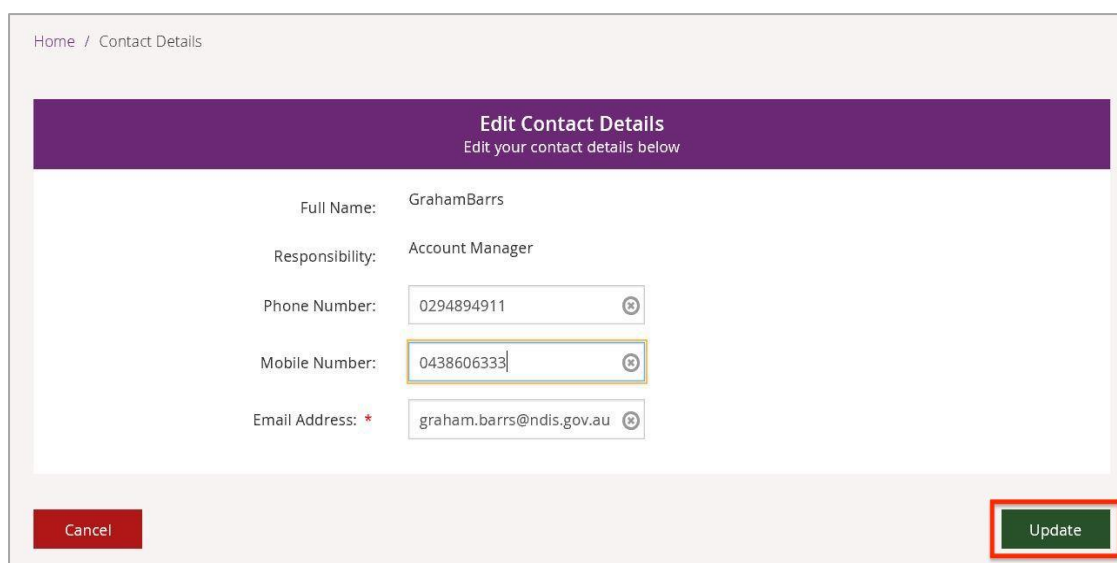
How Frequently Can NDIA Contact Me? ▼ [Open Section](#)

Organisational Staff ▼ [Open Section](#)

Bank Details ▼ [Open Section](#)

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

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: 0294894911
Mobile Number: 0438606333
Email Address: * graham.baars@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.
2. Select **Edit** to update whether the provider should display in the Provider Finder, and if so whether the address should also be displayed.

Profile
View your profile details below.

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

About Me
[Open Section](#)

My Organisation Details
[Close Section](#)

Trading Name: Big Fun

Legal Name: TISDELL, STEPHEN JOHN

Organisation ID: 4050004196

Address: 15 Tay Street
Watson, ACT, 2076

Phone Number: 0262000000

Email Address: graham.barrs@actpeace.ngo.com.au

Website:

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.

3. Select '**Yes**' if the provider should display in the Provider Finder, and if so whether the address should also be displayed. Then select **Update**.

Edit My Organisation Details
Choose if you would prefer to display details of the organisation on the provider finder

Trading Name: Big Fun

Legal Name: TISDELL, STEPHEN JOHN


Organisation ID: 4050004196

Address: 15 Tay Street
Watson, ACT, 2076

Telephone Number: 0262000000

Email: graham.barrs@actpeace.ngo.com.au

Website:

Provider Finder Display: ☒ Yes ☐ No 

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

Cancel

Update

Note: To edit your organisation's details including your email address, to make sure you receive important information, you will need to contact the NDIS Quality and Safeguards Commission.

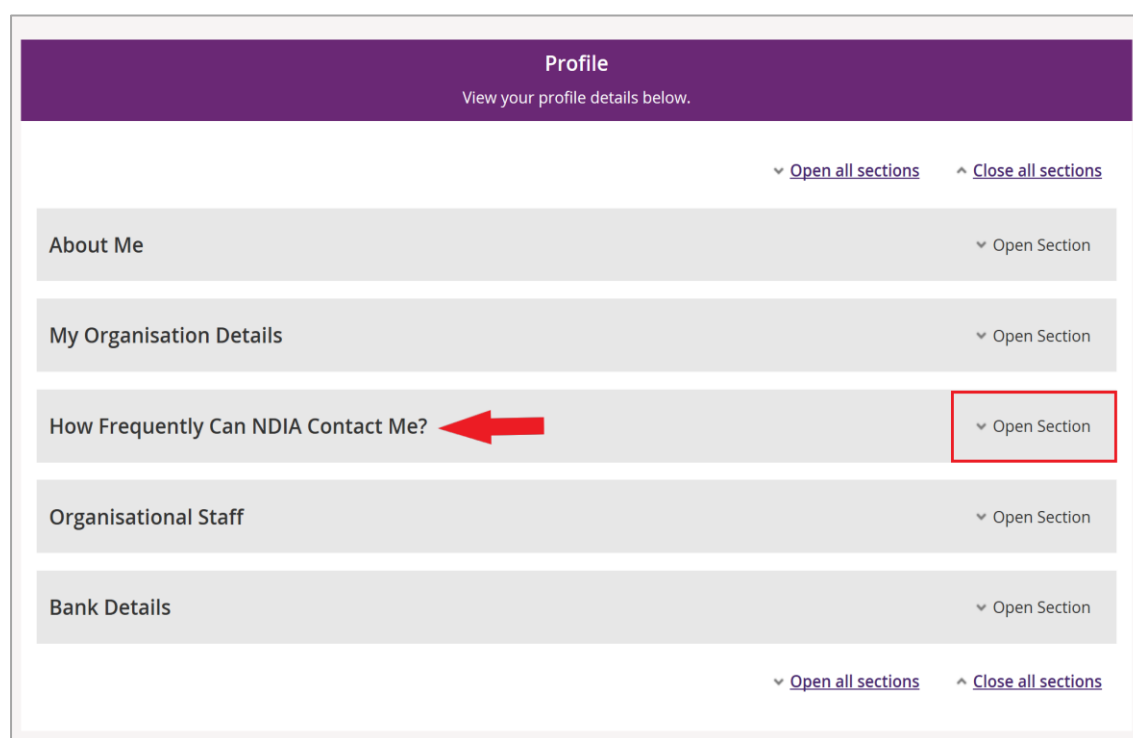
How Frequently Can NDIA Contact Me?

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.



Profile
View your profile details below.

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

About Me [Open Section](#)

My Organisation Details [Open Section](#)


How Frequently Can NDIA Contact Me? [Open Section](#)

Organisational Staff [Open Section](#)

Bank Details [Open Section](#)

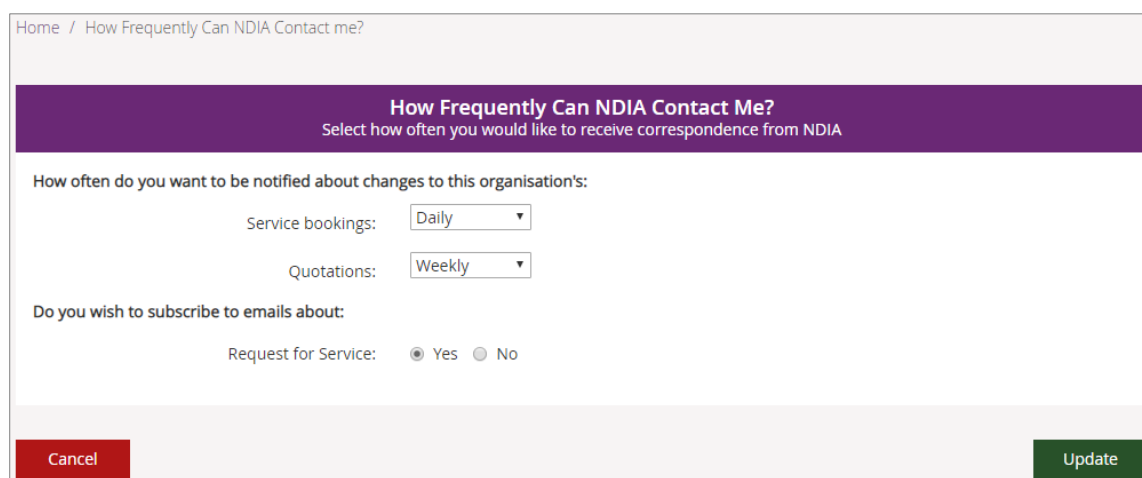
[Open all sections](#) [Close all sections](#)

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



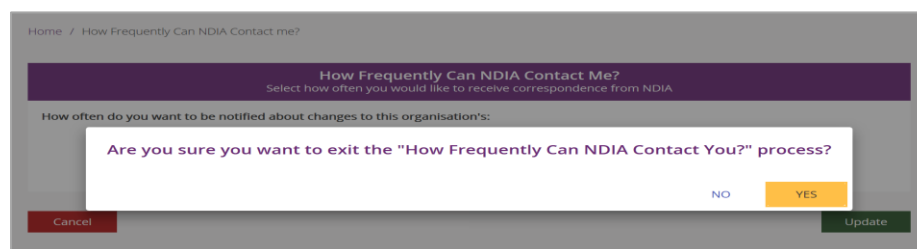
3. Choose from the drop-down how often you wish to receive service bookings and quotations notifications and select **Update**:

- 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.

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.

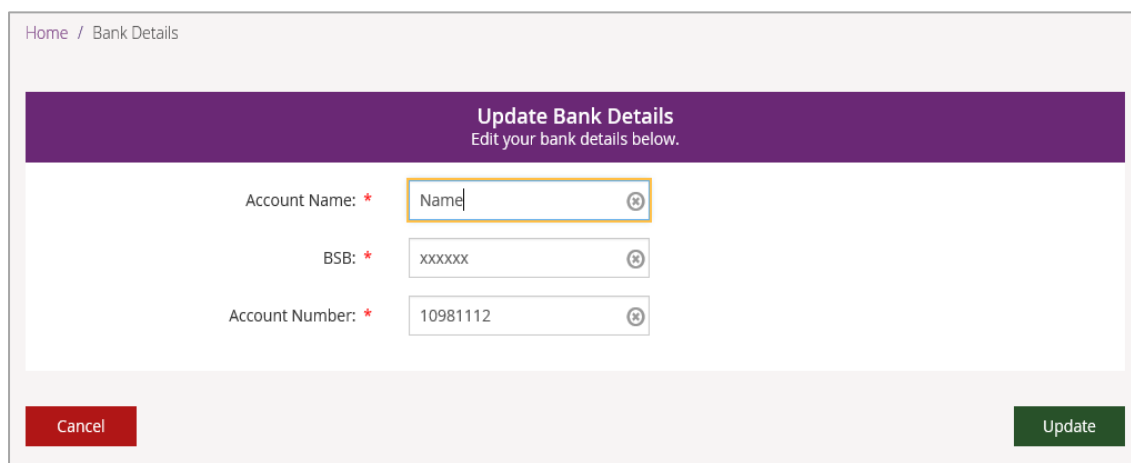
Note: Only the account manager can add or edit bank accounts details.

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.

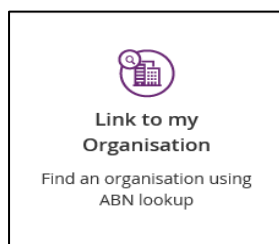
Note: Whenever the bank account details are added or edited, the primary contact for your organisation will receive an SMS stating:

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

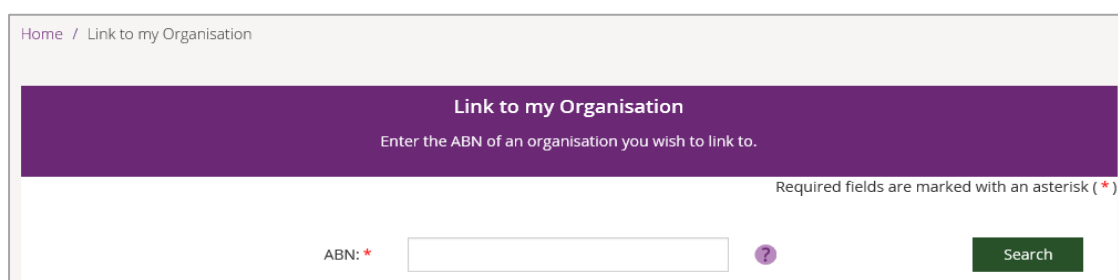
Link to my organisation

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**.

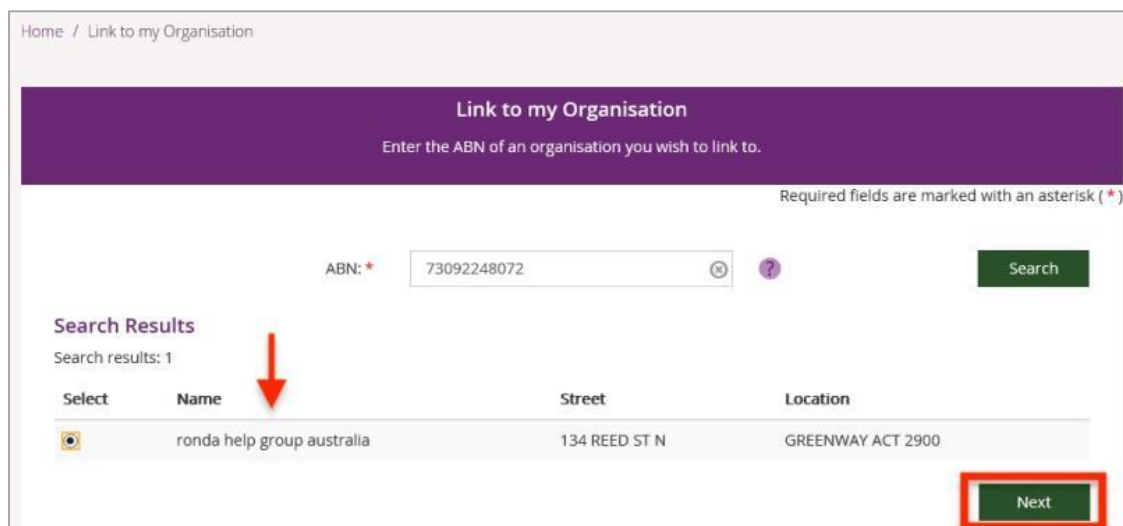
1. Select the **Link to my Organisation** tile on the **myplace** home page.



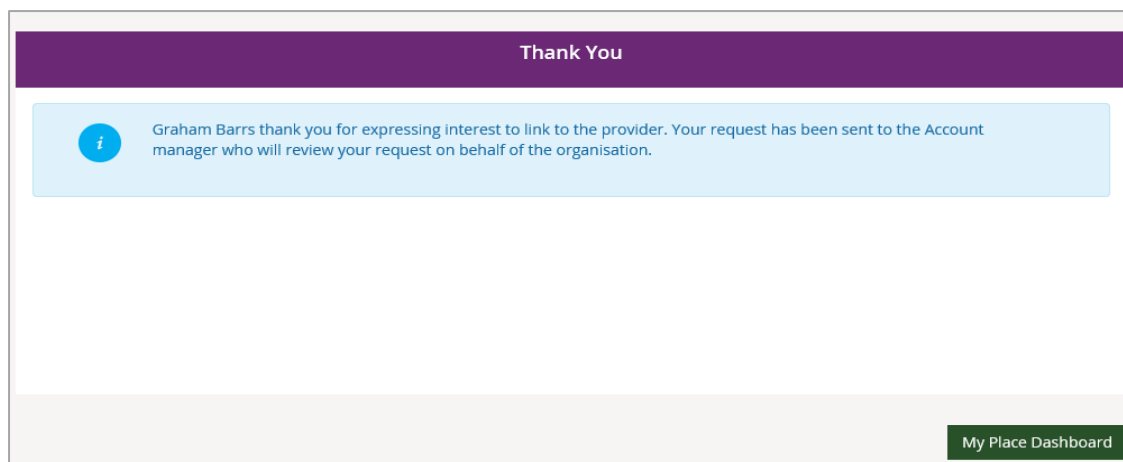
2. Enter the ABN (11 digits, no spaces) of the provider to which you wish to link and select **Search**.

A screenshot of the "Link to my Organisation" page. It has a purple header bar with the title "Link to my Organisation" and the instruction "Enter the ABN of an organisation you wish to link to." Below this is a form with a label "ABN: *" and an input field containing "73092248072". To the right of the input field is a purple question mark icon. A green "Search" button is on the right. A note at the bottom right says "Required fields are marked with an asterisk (*)". The breadcrumb "Home / Link to my Organisation" is at the top left.

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

A screenshot of the "Link to my Organisation" page showing search results. The ABN input field now contains "73092248072" and has a dropdown arrow. The "Search" button is still there. Below the form, the section "Search Results" shows "Search results: 1". A table lists the results with columns "Select", "Name", "Street", and "Location". The first result is "ronda help group australia" at "134 REED ST N", "GREENWAY ACT 2900". A red arrow points to the "Name" column. A green "Next" button is at the bottom right, highlighted with a red box. The breadcrumb "Home / Link to my Organisation" is at the top left.

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



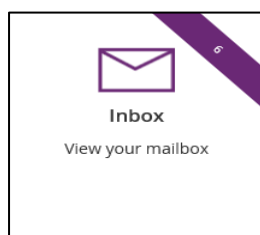
Important note: If you are linking to a provider that does not have a primary contact set up, a new screen will pop up that asks you to provide one.

Managing correspondence and messages

Inbox

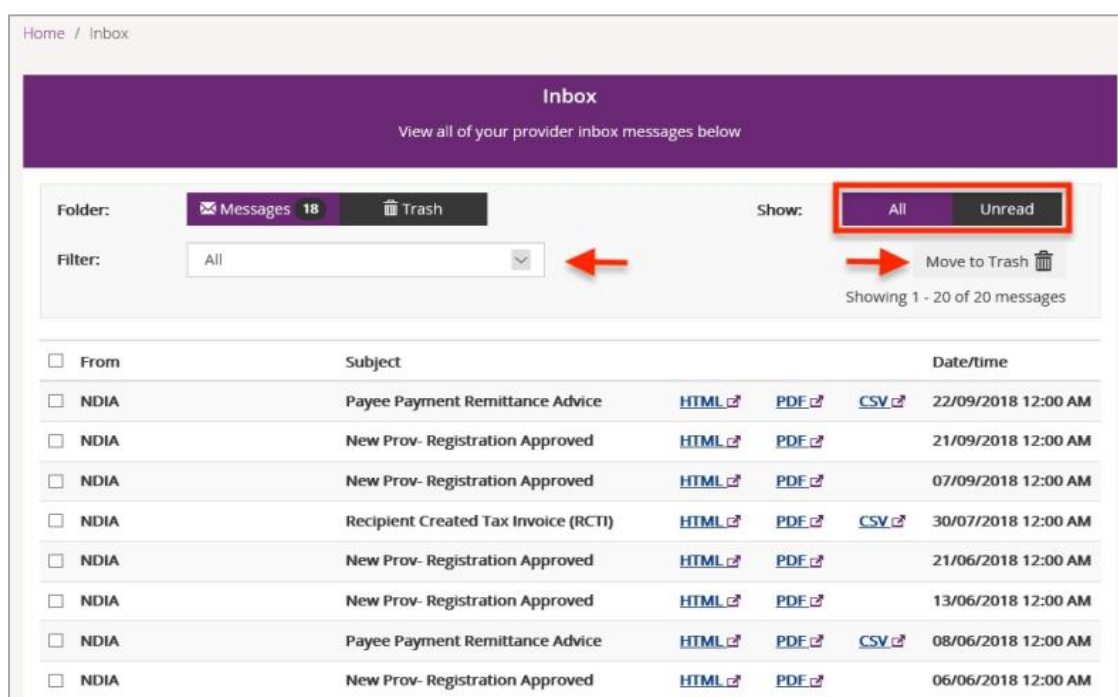
All messages and letters sent to your organisation will appear in the **Inbox**. When you open the **Inbox**, you will see all messages, not just those relating to you or your participants. The number next to messages is the number of new (unread) messages received.

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



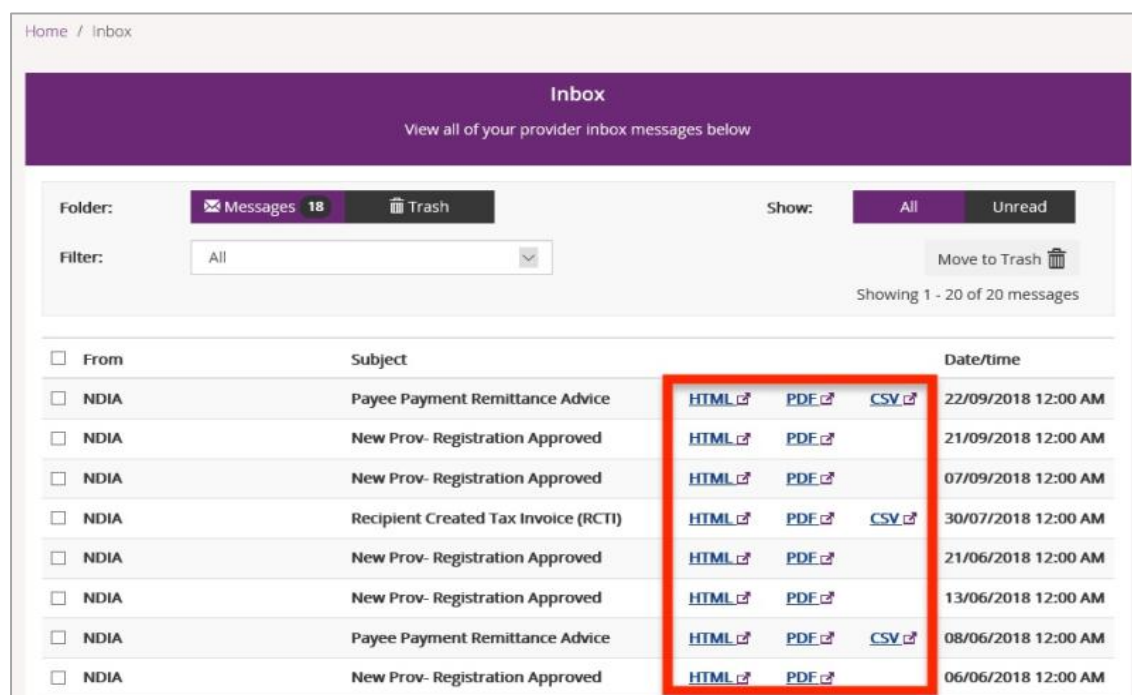
2. Your **Inbox** displays messages and letters received from NDIA.

Note: See [How Frequently Can NDIA Contact Me?](#) to choose how often you wish to be notified.



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.

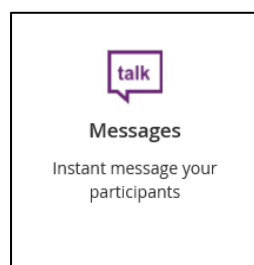


Messages

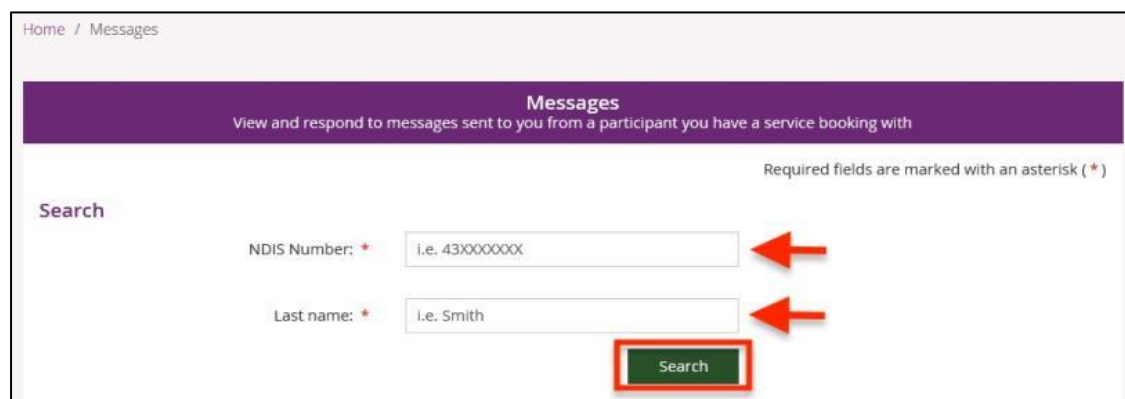
You can have online conversations with your participants through the instant messaging function.

Starting a new instant message

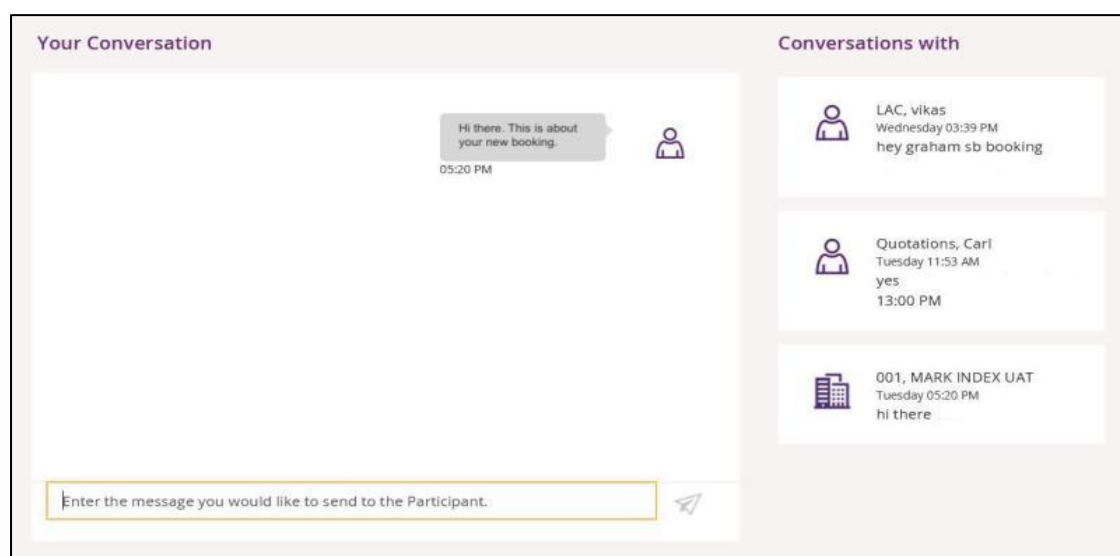
- Select the **Messages** tile on the **myplace** home page.




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



The **Your Conversation** window displays.



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 your services

These functions enable you to:

1. Find your active Participants
2. View a **Participant's plan** (if you provide services to that participant and have their consent).
3. 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).
4. View and manage your **Payment Requests** (how you submit claims for payment for supports delivered).
5. View and respond to **Quotations** (requests for quotes for supports from the Agency or a participant).
6. View **Referrals** to your organisation (created by the Agency when a participant would like you to contact them).
7. View and action Support Coordination **Requests for Service**.
8. Use the **Provider Finder** (to find additional supports for a participant).
9. **Upload Evidence** related to the participant or their supports.
10. **Download** and view reports about all the service bookings you have with active participants and information about participants you have service bookings with, and also your quotation requests.

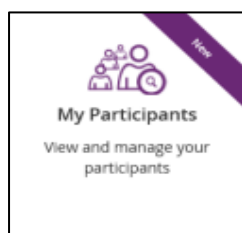
Finding Participants

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

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 |

3. 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

Showing 10 of 100 participants

| | Plan | Service Bookings | Payment Requests |
|---|----------------------|--|------------------------|
| AnyCust LostCust - 430214131 Plan ends 23/08/2019 | View | View Create | Create |

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

View plan

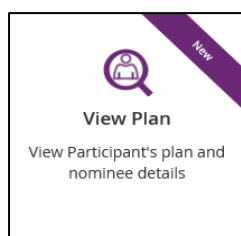
View Plan allows you to view the plans of participants that you have active service bookings with and have given the NDIA consent to share their plan with you.

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.

The 365-day plan auto-extension feature identifies plans near expiration and auto extends those plans up to 365 days, until the new plan review is approved to ensure that there is not a gap between the plans. The 365-day plan auto-extension feature will allow you to discuss the range of services participants might need during the extension period.

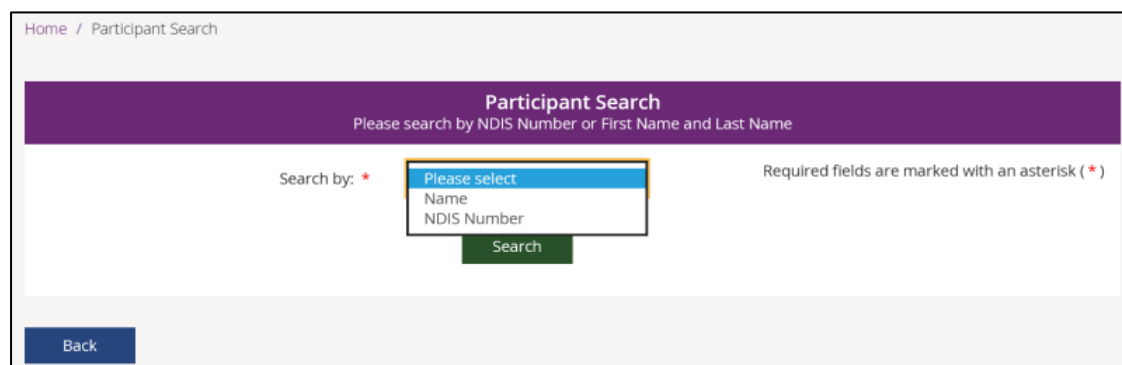
See **Download Service Bookings** if you want to download and identify any plans that are expiring and include service bookings that qualify for automatic extension.

1. On the home page select **View Plan**.

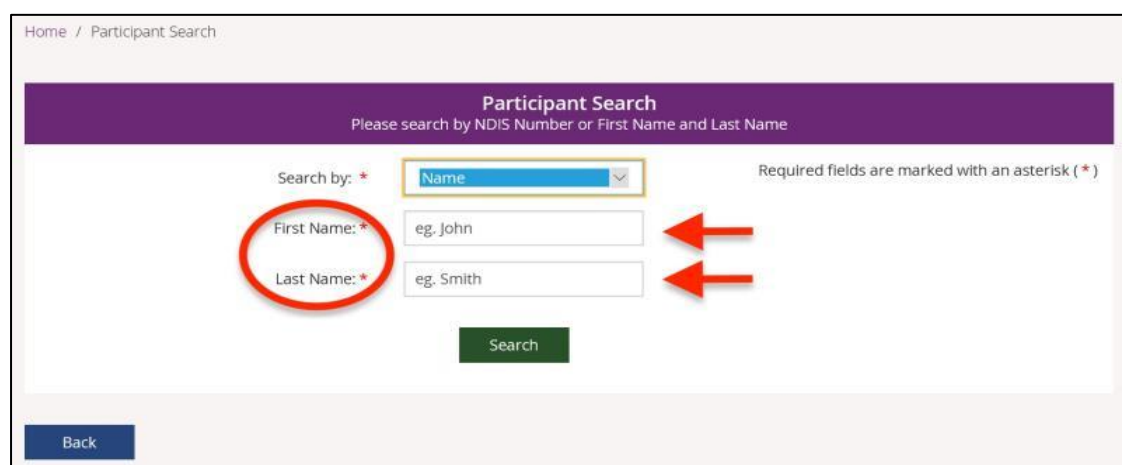


A **Participant Search** screen displays.

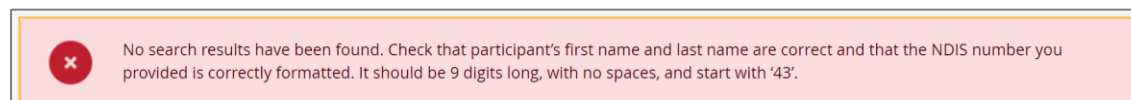
2. A drop-down menu displays for the search criteria field. Use the drop-down menu to select the criteria you wish to use. In this example we are searching by the **Participant's Name**.
3. Enter the participants first and last name in the search criteria field.
4. Select **Search**.



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.

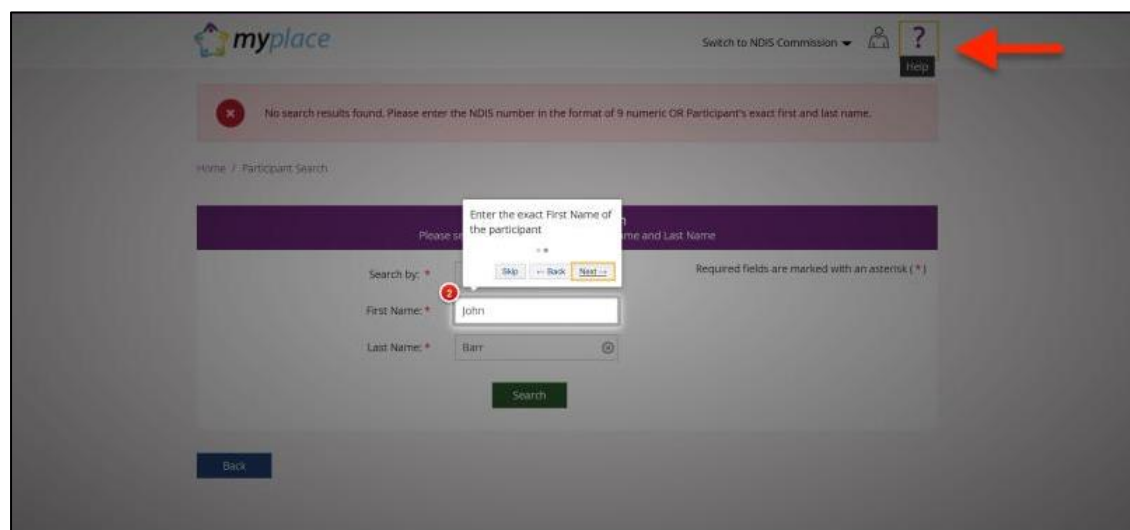


6. You can only view a participant's plan if you have an active service booking with the participant. If you do not have an active service booking you will receive an error message.

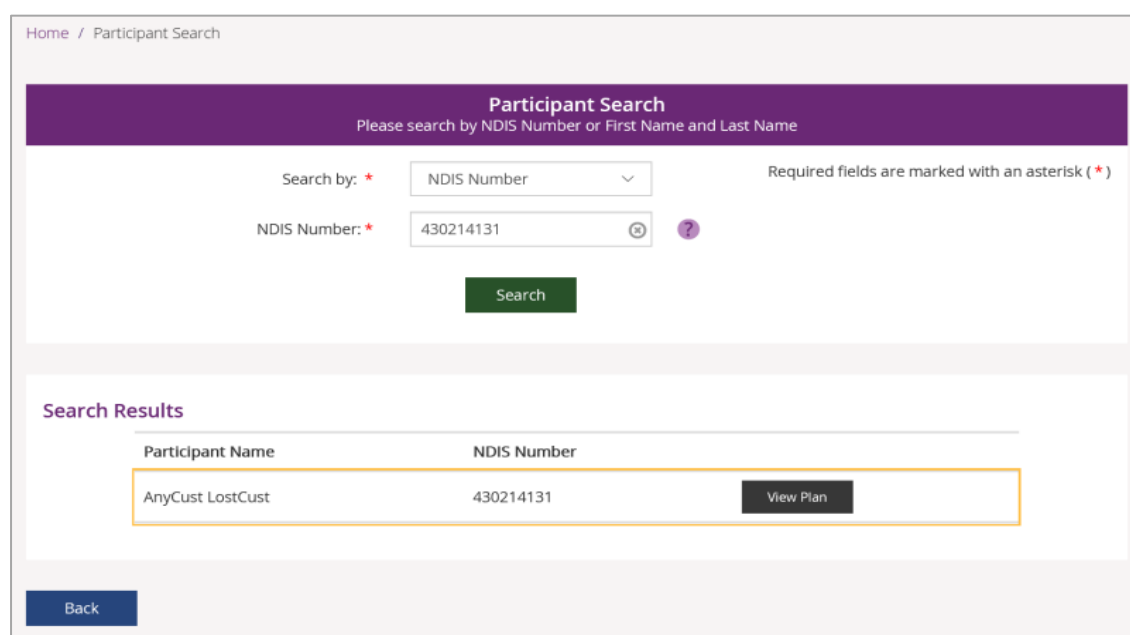


Note: To create the first service booking, you will need to work from the participant's printed plan, or the information the participant provides to you.

7. You can hover over the '?' Help icon to obtain help on fields.



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



| Participant Name | NDIS Number |
|------------------|-------------|
| AnyCust LostCust | 430214131 |

- 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 current plan and their medium to long term life goals

- **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

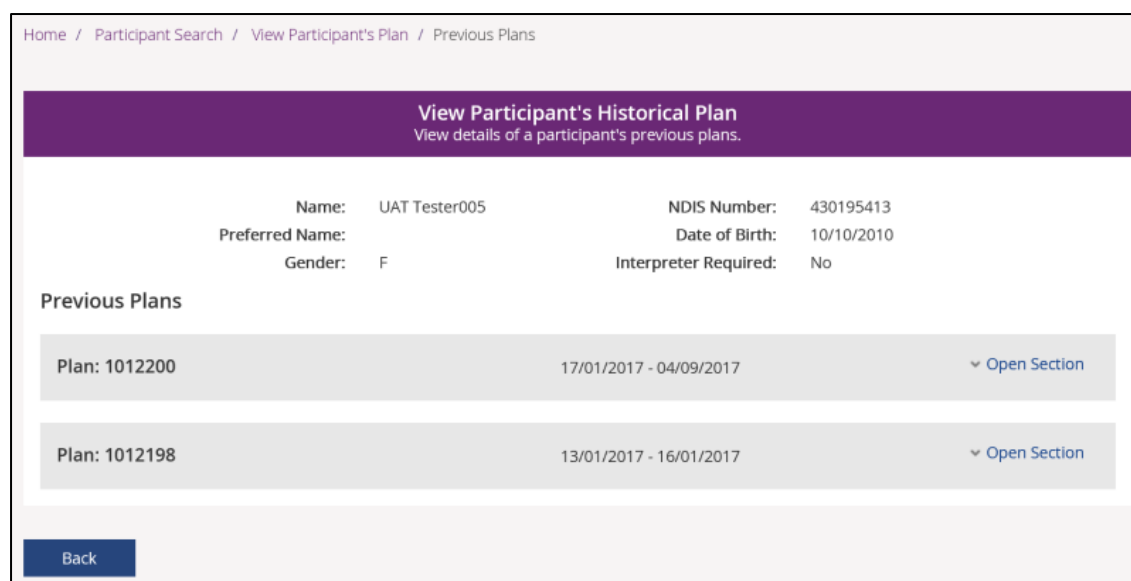
Open Section

Open all sections

Close all sections

Back

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

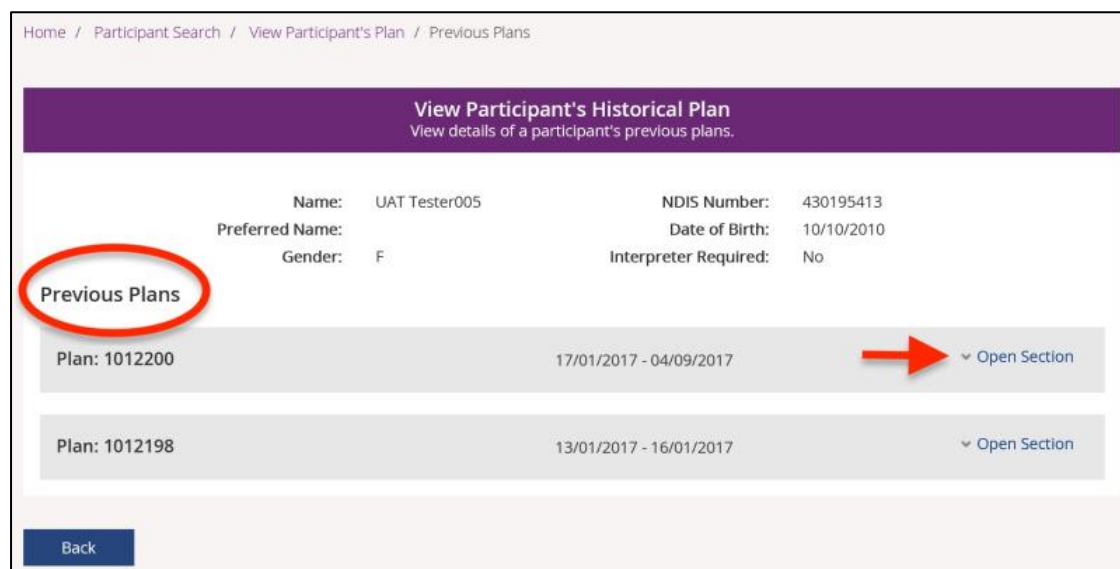
Previous Plans

| | | |
|---------------|-------------------------|----------------|
| 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.

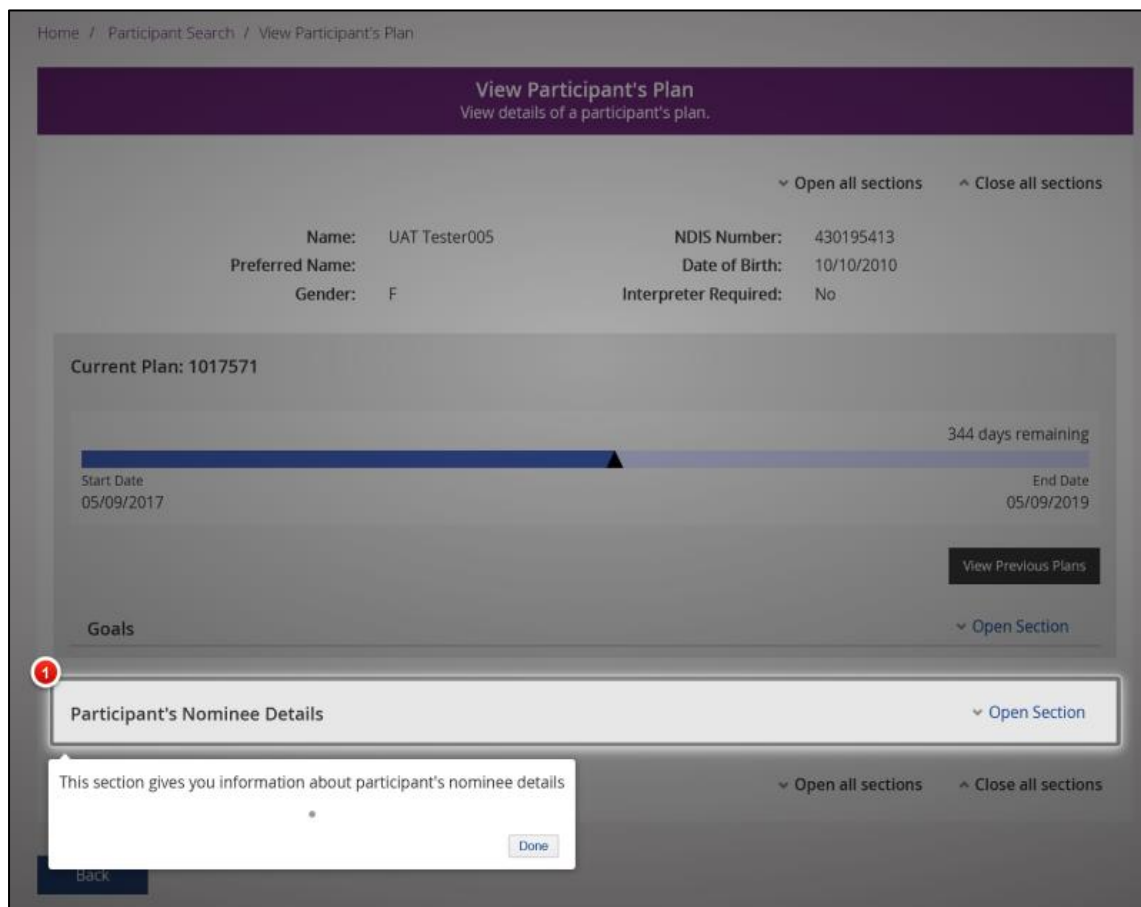
Name: UAT Tester005 NDIS Number: 430195413
Preferred Name: Date of Birth: 10/10/2010
Gender: F Interpreter Required: No

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

1 Participant's Nominee Details Open Section

This section gives you information about participant's nominee details

Done

Back

Open all sections Close all sections

10. 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.
11. 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.

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

Funds Remaining: \$1,000.00

Approved Funds: \$1,000.00

Allocated Items(0)

None

Improved daily living

Funds Spent: \$20.00

Funds Remaining: \$1,091.00

Approved Funds: \$1,111.00

Allocated Items(0)

None

Finding and keeping a job

Funds Spent: \$0.00

Funds Remaining: \$2,000.00

Approved Funds: \$2,000.00

Allocated Items(0)

None

Improved health and wellbeing

Funds Spent: \$0.00

Funds Remaining: \$2,000.00

Approved Funds: \$2,000.00

Allocated Items(0)

None

Improved living arrangements

Funds Spent: \$0.00

Funds Remaining: \$2,000.00

Approved Funds: \$2,000.00

Allocated Items(0)

None

Improved learning

Funds Spent: \$0.00

Funds Remaining: \$20,000.00

Approved Funds: \$20,000.00

Allocated Items(0)

None

Improved relationships

Funds Spent: \$0.00

Funds Remaining: \$200.00

Approved Funds: \$200.00

Allocated Items(0)

None

Increased social and community participation

Funds Spent: \$0.00

Funds Remaining: \$2,500.00

Approved Funds: \$2,500.00

Allocated Items(0)

None

Support coordination

Funds Spent: \$21.00

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 agreement (not held in the NDIS system) between you and the participant.



Service bookings must be completed before you provide supports to a participant and be paid for a service. It must be in line with the NDIS Pricing Arrangements and Price Limits and Support Catalogue

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:

1. [Create a new service booking](#) with a participant.
2. [View and edit existing service bookings](#)
3. [Accept or reject a new service booking](#) including providing a reason for rejection
4. [Accept or reject a change to an existing service booking](#), including providing a reason for rejection
5. [Edit support details on a service booking](#) including duration, price and quantity
6. [End a service booking](#) including immediate cancellation
7. [Delete a service booking](#)
8. View Quote ID and select hyperlink to navigate to Quotation screen

Important points to note:

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.

The 365-day plan auto-extension feature identifies plans near expiration and auto extends those plans up to 365 days, until the new plan review is approved to ensure that there is not a gap between the plans. The 365-day plan auto-extension feature will allow you to discuss the range of services participants might need during the extension period.

From 10 February 2020, participant plans that include funding for Specialist Disability Accommodation (SDA) will have a service booking extended and pro-rata funding is allocated automatically where the extension has been applied. Please continue to regularly submit payments requests in accordance with the agreed service booking.

- For participant plans approved after 1 July 2021, SIL is no longer a quotable support. If a participant's plan receives an automatic extension, SIL providers will need to update the allocation of the service booking themselves.

From 9 May 2020, participant plans that include funding for Assistive Technology, in some circumstances, will have a service booking extended and pro-rata funding allocated automatically where the extension has been applied.

- The 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.

- From the 27 March 2021, you can view the Quote ID of an approved quote in the 'Find' page, under Service bookings and can select the hyperlink to navigate you to the Quotation screen.

You can view and search the quote ID attached to all historic service bookings on the 'Find' page, under Service bookings and Quotation page.

For service booking without a quote, the quote ID column will show as 'Not available.'

Create service bookings

Providers can create two types of service bookings depending on the participant's plan.

Participant plans will have funding allocated at either a category level or an item level. Some will have funding at both levels. In this case, providers might need to create two separate service bookings.



IMPORTANT: The Agency recommends that service bookings be created at the category level, if possible. This allows providers and participants to negotiate or access supports on a more flexible basis, especially for on-the-spot assessments or services. This is preferable to having to create another service booking for that item at a later date or having funds locked into a support line item that does not relate to the appropriate support.

Item level funding

If a participant has a stated item in their plan, and the provider tries to create a service booking in the support category but does not choose the stated support item, the portal will reject the service booking.

The stated support item must be selected to create a service booking.

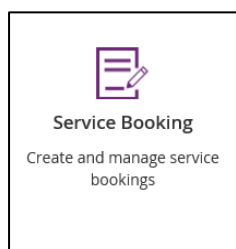
Category level funding

If a participant has funding allocated at a category level, the provider can create a service booking at a category level.

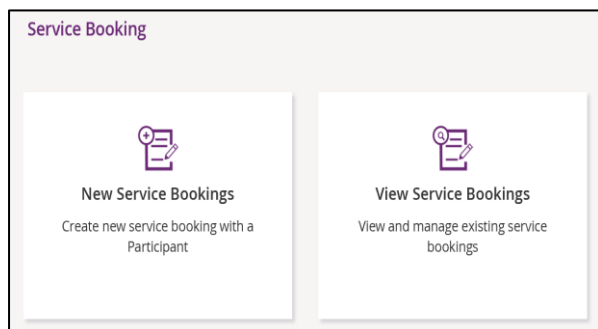
This type of service booking allows providers to use participant funds more efficiently and delivers greater flexibility for participants to utilise their funding across different support items within a support category.

Service booking at the category level funding

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

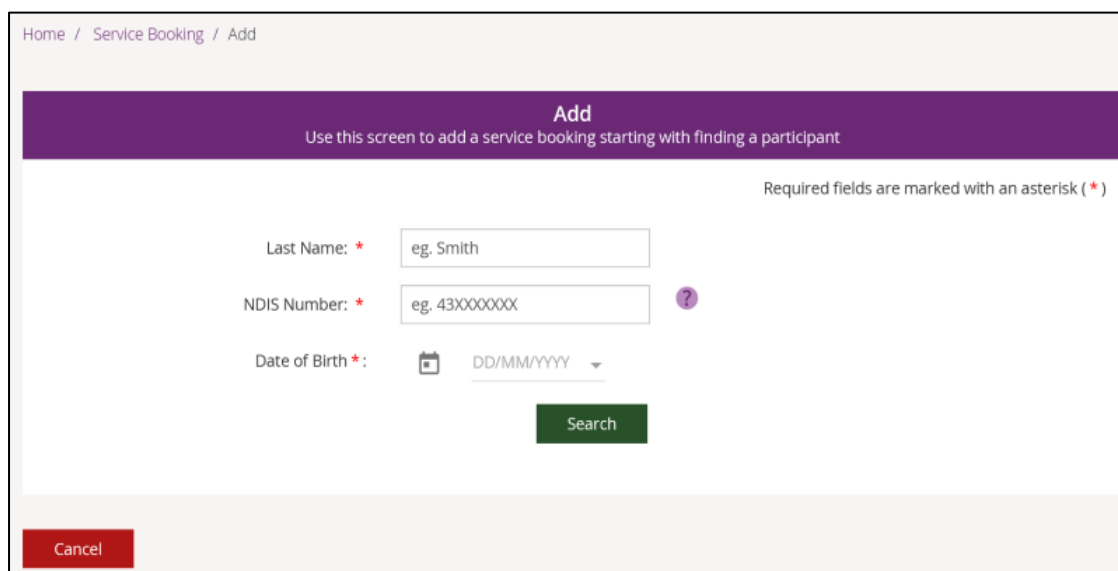


The **Service Booking** page displays.



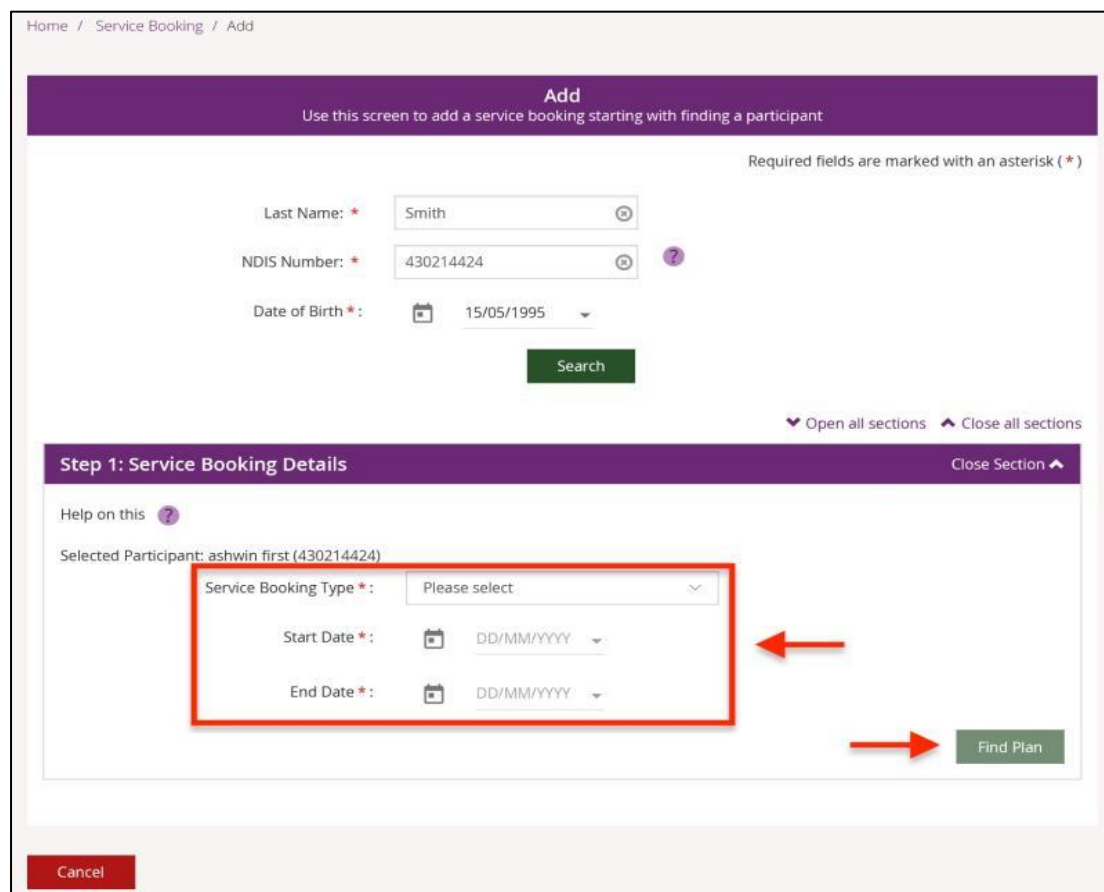
2. Select the **New Service Bookings** tile.

The **Add** service booking page opens.



The screenshot shows the 'Add' service booking page. At the top, a purple banner reads 'Add' and 'Use this screen to add a service booking starting with finding a participant'. Below this, a note states 'Required fields are marked with an asterisk (*)'. The form contains three input fields: 'Last Name: *' with the example 'eg. Smith', 'NDIS Number: *' with the example 'eg. 43XXXXXXX' and a help icon, and 'Date of Birth *: *' with a calendar icon and the format 'DD/MM/YYYY'. A green 'Search' button is positioned below the input fields. At the bottom left, there is a red 'Cancel' button.

3. Enter the participant's **Last Name**, **NDIS Number**, **Date of Birth** and select **Search**.
The **Service Booking Details** section (Step 1) opens.



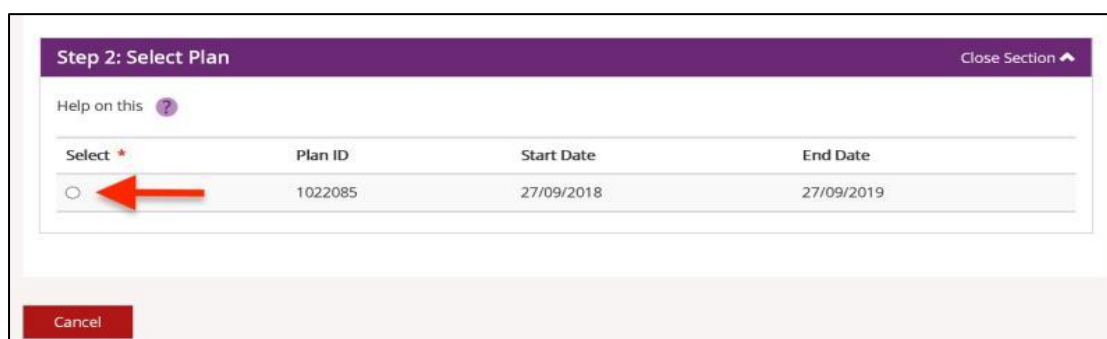
4. Select the **Service Booking Type**. The types available are:
 - **Standard booking** is available when funds are Agency managed. In most instances the only option will be standard booking.
 - **Plan managed booking** is only available when a provider is managing participant funding, as specified 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.
Note: Plan managed Service Booking Process
 - Plan management financial intermediary and monthly fees are stated items. These should be specified in the plan and the costs must be in line with the pricing guide.

- The plan manager must create a standard line item service booking for the financial intermediary set up and monthly fees. To create standard line item refer to the steps in service booking at the Line Item level.
- Once standard line item service booking is created, the plan manager will be able to create plan managed service booking for plan managed funded supports within the plan. To create plan managed service booking, refer to steps 3 to 12.

In-Kind service booking is only managed by NDIA. In-kind are prepaid services funded by state, territory or Commonwealth governments. When these supports stop, you can create service bookings to claim the supports through NDIS. If you have any queries please contact INKIND@ndis.gov.au

5. Enter the start and end dates of the service booking. These dates cannot sit outside the date range of the plan.
6. Select **Find Plan**.

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

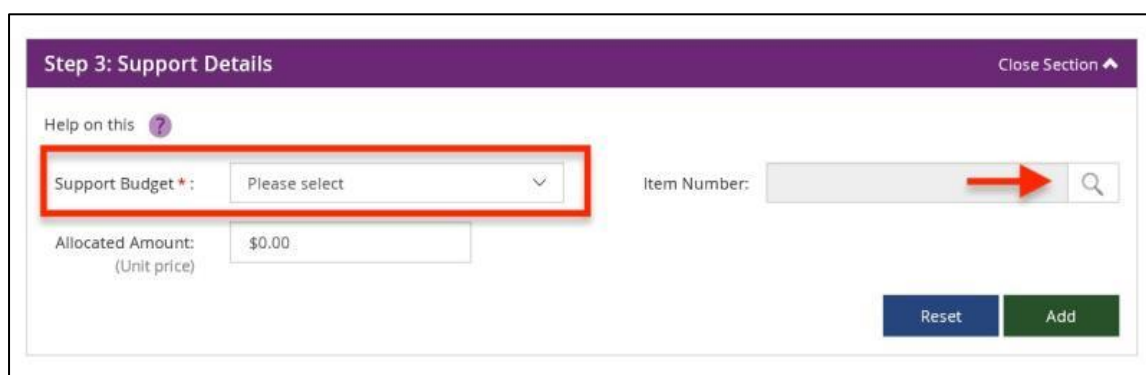


The screenshot shows the 'Step 2: Select Plan' section of the provider portal. It features a table with columns for 'Select *', 'Plan ID', 'Start Date', and 'End Date'. A red arrow points to the radio button in the 'Select *' column for the first row, which has a Plan ID of 1022085, a Start Date of 27/09/2018, and an End Date of 27/09/2019. Below the table is a 'Cancel' button.

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

7. 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 includes a 'Support Budget *' dropdown menu with 'Please select' as the current selection, which is highlighted with a red box. To the right is an 'Item Number' input field with a red arrow pointing to the search icon. Below the budget dropdown is an 'Allocated Amount: (Unit price)' field showing '\$0.00'. At the bottom right are 'Reset' and 'Add' buttons.

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.

If you wish to select the Item Number, please refer to service booking at the [Line Item Level funding](#).

8. Select the support category using the drop-down button for **Support Budget**.
9. Enter the Allocated Amount as agreed with the participant then select **Add**.
 - Select **Reset** to clear all your entries and selections.
 - If you need to add another support item, select **Add**.

Added Details

Close Section ^

Help on this ?

| No. | Support Budget | Support Item Number | Support Item Name | Quantity | Allocated Amount (Unit Price) | Action |
|-----|----------------|---------------------|-------------------|----------|-------------------------------|---|
| 1 | Consumables | - | - | - | \$2,000.00 | Edit Remove |

Next

10. Once you have selected **Next** to continue, the booking and item details display. If you need to edit the details of the service booking, select **Back**.
11. 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.

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 |
|-----------------------------------|------------------|------------|------------|------------------------|-----------------|----------------------|
| Justin Testcase1 (430220107) | Standard Booking | 01/10/2019 | 17/12/2019 | \$2,000.00 | - | Edit |

Support Details

| No. | Support Budget | Support Item Number | Support Item Name | Quantity | Allocated Amount (Unit price) |
|-----|----------------|---------------------|-------------------|----------|----------------------------------|
| 1 | Consumables | - | - | - | \$2,000.00 |

Comments:

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

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

12. Ensure the service booking is as agreed with the participant, then tick the mandatory declaration and select **Submit**.
13. 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.

Service booking at the line item level

1. Follow steps 1 to 7 of service booking at the [Category level funding](#) to open the **Support Details** section.
2. Select the support category using the drop-down button for **Support Budget**.
3. Select the **Item Number** using the drop-down button.

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

Step 3: Support Details Close Section ▲

Help on this ?

Support Budget *: Assistive Technology ▼

Allocated Amount: \$400.00 ⊕

Item Name: Mobile Shower Commode - Child Transp

Item Number: 05_091203055_0103_1_2 🔍

Quantity: 1 ⊗

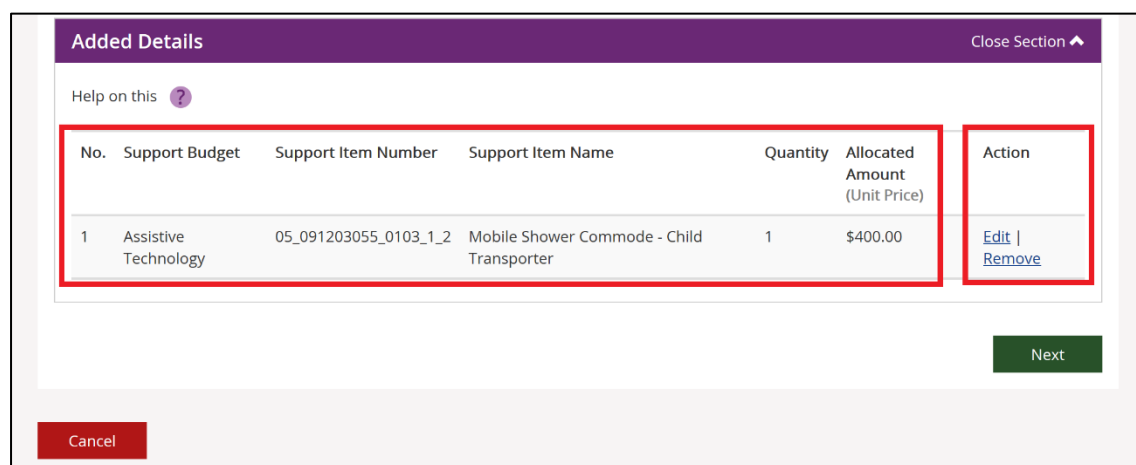
[Reset](#)
[Add](#)

4. Enter the **Allocated Amount** and the **Quantity** as agreed with the participant then select **Add**.

- Select **Reset** to clear all your entries and selections.
- If you need to add another support item, select **Add**.

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.

5. When the details are correct, select **Next** to continue.



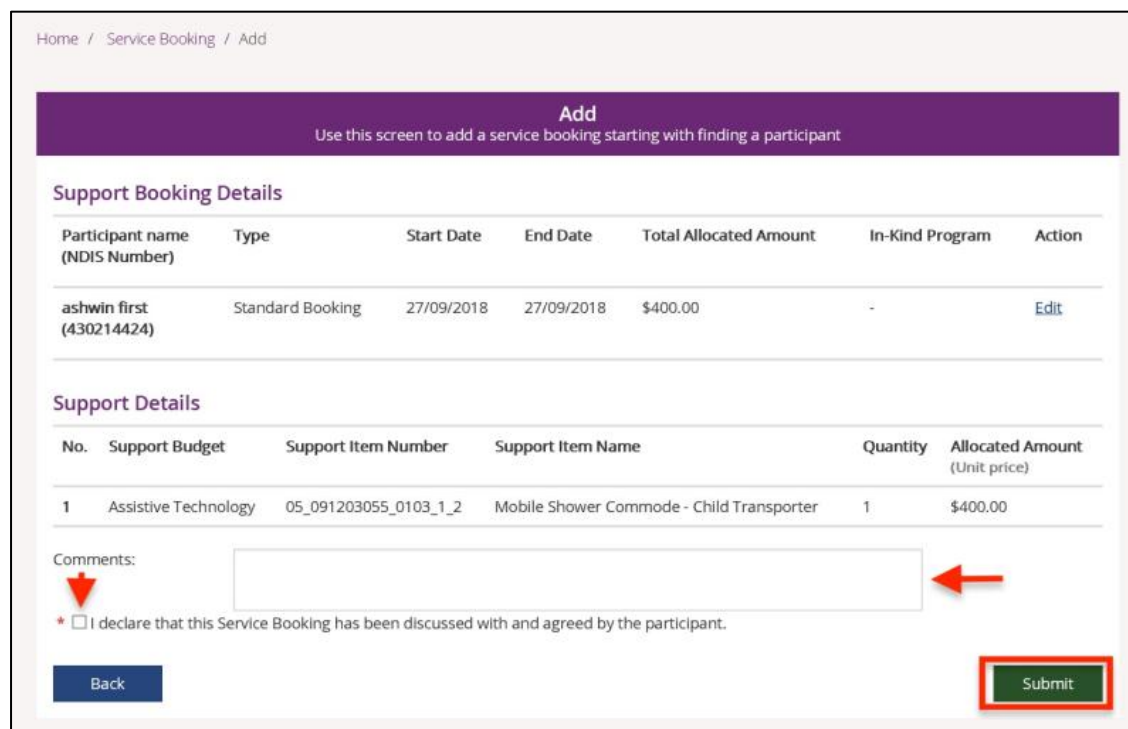
| No. | Support Budget | Support Item Number | Support Item Name | Quantity | Allocated Amount (Unit Price) | Action |
|-----|----------------------|-----------------------|---|----------|-------------------------------|---|
| 1 | Assistive Technology | 05_091203055_0103_1_2 | Mobile Shower Commode -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

[Cancel](#) [Next](#)

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

7. Check the service booking is correct and when you are confident that everything is correct, you can add comments to the 'Comments' field to explain the booking.

8. 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 |

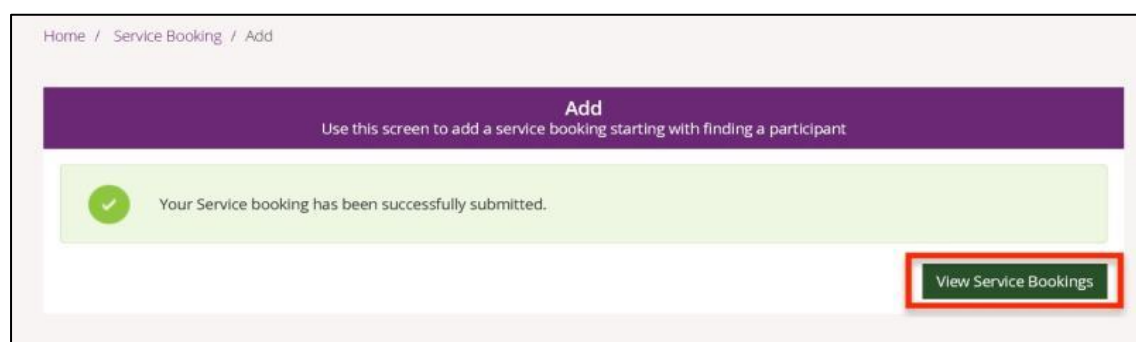
Comments:

* ☐ 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.

9. 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.

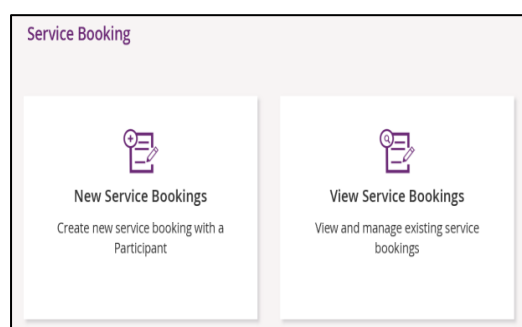
[View Service Bookings](#)

NOTE: For **Quotable items (including SDA and Assistive Technology)**, NDIA will approve your quote and the related service booking is created automatically. You are unable to create a service booking for quotable items. Please refer to the **Quotation** section of this guide for further details.

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.



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

Home / My Service Booking / Find

Find

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

View Service Booking-Help ?

Find a Participant Refine Search Search

Booking Number Status

Initiated By Quote ID

Search Results

602 Results found Sort By Service Booking Number

| Service Booking Number | Quote ID | Service Booking Type | Participant Name (NDIS Number) | Start Date | End Date | Submitted Date | Service Booking Status | Initiated By |
|--------------------------|-------------------------|----------------------|------------------------------------|------------|------------|----------------|------------------------|--------------|
| 55003168 | Not available | Standard Booking | Plan Flex22 Plan Man02 (430237017) | 23/03/2019 | 24/03/2021 | 23/03/2020 | Inactive | Provider |
| 55003164 | 5004319 | Plan Managed | Plan Flex22 Plan Man02 (430237017) | 23/03/2019 | 24/03/2021 | 23/03/2020 | Inactive | Provider |
| 55003161 | 5004325 | Plan Managed | Plan Flex22 Plan Man02 (430237017) | 23/03/2019 | 24/03/2021 | 23/03/2020 | Inactive | Provider |
| 55003153 | Not available | Standard Booking | Plan Flex22 Plan Man02 (430237017) | 22/03/2019 | 24/03/2021 | 23/03/2020 | Inactive | Staff |
| 55003148 | Not available | Standard Booking | Plan Flex21 Plan Man01 (430237016) | 22/09/2019 | 23/03/2020 | 23/03/2020 | Inactive | Provider |
| 55003145 | 5004324 | Standard Booking | Plan Flex22 Plan Man02 (430237017) | 22/03/2019 | 24/03/2021 | 23/03/2020 | Inactive | Staff |

Note: Use the **Next** and **Previous** buttons at the bottom of the screen to navigate forwards and backwards through the lists that have more than 10 entries.

Note: You can view the Quote ID of an approved quote and select the hyperlink to navigate you to Quotation screen.

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:
- By entering a participant's name or NDIS number, or service booking number; then click the **Search** button.
 - By selecting from the **Initiated By** or **Status** drop-downs; 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). |

| Service Booking Status | Definition |
|---|---|
| | It can have payment requests made against it if the date of service delivery falls within the original service booking dates. |
| Awaiting participant review | <p>The participant needs to review the new service booking.</p> <p>Please note: If the participant does not have access to their myplace portal to review the service booking, you should contact the Agency.</p> |
| 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 | <p>The participant needs to review the updated service booking.</p> <p>Please note: if the participant does not have access to their myplace portal to review the service booking, please contact the Agency.</p> |

- You can then sort the list of **Search Results** by the column titles; just make your selection from the options in the **Sort By** drop-down 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 / My Service Booking / Find

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

View Service Booking-Help ?

Find a Participant ▼ Refine Search Search

Search Results
599 Results found

Sort By Service Booking Number ▼

| Service Booking Number | Quote ID | Service Booking Type | Participant Name (NDIS Number) | Start Date | End Date | Submitted Date | Service Booking Status | Initiated By |
|--------------------------|---------------|----------------------|--|------------|------------|----------------|------------------------|--------------|
| 55011915 | Not available | Standard Booking | Agency Que Quotation (430243588) | 17/03/2021 | 17/04/2021 | 17/03/2021 | Inactive | Provider |
| 55011797 | Not available | Plan Managed | Plan Dee Bee Managed Testing (430252861) | 11/03/2021 | 13/03/2021 | 11/03/2021 | Inactive | Provider |
| 55011796 | Not available | Plan Managed | Plan Dee Bee Managed Testing (430252861) | 11/03/2021 | 13/03/2021 | 11/03/2021 | Inactive | Provider |
| 55011795 | Not available | Standard Booking | Ardath APITestDonotTouch (430249253) | 11/03/2021 | 11/03/2021 | 11/03/2021 | Inactive | Provider |

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

Home / My Service Booking / Find

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

View Service Booking-Help ?

Find a Participant ▼ Refine Search Search

Search Results
600 Results found

Sort By Service Booking Number ▼

| Service Booking Number | Quote ID | Service Booking Type | Participant Name (NDIS Number) | Start Date | End Date | Submitted Date | Service Booking Status | Initiated By |
|--------------------------|-------------------------|----------------------|------------------------------------|------------|------------|----------------|------------------------|--------------|
| 55003161 | 5004325 | Plan Managed | Plan Flex22 Plan Man02 (430237017) | 23/03/2019 | 24/03/2021 | 23/03/2020 | Active | Provider |
| 55003153 | Not available | Standard Booking | Plan Flex22 Plan Man02 (430237017) | 22/03/2019 | 24/03/2021 | 23/03/2020 | Active | Staff |
| 55003148 | Not available | Standard Booking | Plan Flex21 Plan Man01 (430237016) | 22/09/2019 | 23/03/2020 | 23/03/2020 | Inactive | Provider |
| 55003145 | 5004324 | Standard Booking | Plan Flex22 Plan Man02 (430237017) | 22/03/2019 | 24/03/2021 | 23/03/2020 | Active | Staff |
| 55003143 | Not available | Standard Booking | Plan Flex05 Shyam05 (430236992) | 22/03/2019 | 23/09/2019 | 23/03/2020 | Inactive | Provider |

The details of the service booking display.

[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 | Quote ID | Start Date | End Date | Revised End Date | Total | In-Kind Program | Status |
|-----------------------------------|------------------|----------|---------------|------------|------------|---------------------|----------|-----------------|--------|
| John Citizen (430232627) | Standard Booking | 55011475 | Not available | 25/02/2021 | 31/08/2021 | - | \$129.00 | - | Active |

Support Details

| No. | Support Budget | Support Item Number | Support Item Name | Quantity | Allocated Amount (Unit Price) | Remaining Amount |
|-----|----------------|---------------------|------------------------------|----------|----------------------------------|------------------|
| 1 | Consumables | 03_090_0121_1_1 | Interpreting And Translating | 1 | \$129.00 | \$129.00 |

[Back](#)
[Update End date](#)

Note: End dates of service bookings that are about to expire, and that share the same end date as the plan they belong to, will be extended using the 365-day plan auto-extension feature. You will see an alert in the service booking screen to notify you when a service booking has received an extension: “The end date of this service booking has been changed to align with the participant’s plan dates”. You may need to change your service booking in the old plan.

When viewing service bookings within 90 days of an expired plan you will see the following alert:

| Alert message displayed | Action |
|---|---|
| The Service Booking end date has changed to <Service Booking End Date displayed>. Funding within the Service Booking may be reduced after <Date displayed>. | You are encouraged to request payment for services provided to participants within 90 days of service. Payment requests made after 90 days may cause a delay in payment. |

When viewing service bookings after 90 days of an expired plan you will see the following alert:

| Alert message displayed | Action |
|--|---|
| The Service Booking end date has changed to <Service Booking End Date displayed>. Funding within the Service Booking may have reduced from <Date displayed>. | Review the service booking details and if you are unable to submit your payment request contact NDIA on 1800 800 110. |

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

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** drop-down.

Home / My Service Booking / Find

Find

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

View Service Booking-Help ?

Find a Participant

▼ Refine Search

Search Results

599 Results found

Sort By

Service Booking Number ▼

| Service Booking Number | Quote ID | Service Booking Type | Participant Name (NDIS Number) | Start Date | End Date | Submitted Date | Service Booking Status | Initiated By |
|--------------------------|---------------|----------------------|--|------------|------------|----------------|------------------------|--------------|
| 55011915 | Not available | Standard Booking | Agency Que Quotation (430243588) | 17/03/2021 | 17/04/2021 | 17/03/2021 | Active | Provider |
| 55011797 | Not available | Plan Managed | Plan Dee Bee Managed Testing (430252861) | 11/03/2021 | 13/03/2021 | 11/03/2021 | Inactive | Provider |

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

Home / My Service Booking / Find

Find

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

View Service Booking-Help ?

Find a Participant Refine Search Search

Booking Number Status Awaiting Rev

Initiated By Include All Quote ID Include All

Search Results

6 Results found

| Service Booking Number | Quote ID | Service Booking Type | Participant Name (NDIS Number) | Start Date | End Date | Revised End Date | Total | In-Kind Program | Status | Initiated By |
|--------------------------|---------------|----------------------|------------------------------------|------------|------------|------------------|-------|-----------------|-----------------|--------------|
| 55005913 | Not available | Standard Booking | GRAEME DAILY ACTIVITY1 (430241149) | 24/04/2020 | 24/04/2021 | 24/04/2020 | | | Awaiting Review | Staff |
| 50023883 | Not available | Standard Booking | Adult Planman3 (430219634) | 14/05/2019 | 01/05/2020 | 03/06/2019 | | | 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 | Quote ID | Start Date | End Date | Revised End Date | Total | In-Kind Program | Status |
|------------------------------------|------------------|----------|---------------|------------|------------|------------------|----------|-----------------|-----------------|
| GRAEME DAILY ACTIVITY1 (430241149) | Standard Booking | 55005913 | Not available | 24/04/2020 | 24/04/2021 | - | \$511.40 | - | 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 Choice & Control | 14_034_0127_8_3 | Plan Management - Financial Administration | 5 | - | \$102.28 | - | - | \$511.40 |

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

4. Review the service booking. If you decide to accept the service booking, select **Accept** from the **Decision** drop-down 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 | Quote ID | Start Date | End Date | Revised End Date | Total | In-Kind Program | Status |
|--|---------------------|----------|------------------|------------|------------|------------------------|----------|--------------------|--------------------|
| GRAEME DAILY ACTIVITY1 (430241149) | Standard Booking | 55005913 | Not available | 24/04/2020 | 24/04/2021 | - | \$511.40 | - | 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 Choice & Control | 14_034_0127_8_3 | Plan Management - Financial Administration | 5 | - | \$102.28 | - | - | \$511.40 |

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

Please select

Accept

Reject



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

5. 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 | Quote ID | Start Date | End Date | Revised End Date | Total | In-Kind Program | Status |
|--|---------------------|----------|------------------|------------|------------|------------------------|----------|--------------------|--------------------|
| GRAEME DAILY ACTIVITY1 (430241149) | Standard Booking | 55005913 | Not available | 24/04/2020 | 24/04/2021 | - | \$511.40 | - | 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 Choice & Control | 14_034_0127_8_3 | Plan Management - Financial Administration | 5 | - | \$102.28 | - | - | \$511.40 |

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 *: Reject

Reason for Rejection *: Change is not acceptable per agreement
No capacity to fulfil
Not enough funding committed
Other
Service not available

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

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** drop-down.

Home / My Service Booking / Find

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

View Service Booking-Help ?

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

Search Results
599 Results found Sort By Service Booking Number

| Service Booking Number | Quote ID | Service Booking Type | Participant Name (NDIS Number) | Start Date | End Date | Submitted Date | Service Booking Status | Initiated By |
|--------------------------|---------------|----------------------|--|------------|------------|----------------|------------------------|--------------|
| 55011915 | Not available | Standard Booking | Agency Que Quotation (430243588) | 17/03/2021 | 17/04/2021 | 17/03/2021 | Active | Provider |
| 55011797 | Not available | Plan Managed | Plan Dee Bee Managed Testing (430252861) | 11/03/2021 | 13/03/2021 | 11/03/2021 | Inactive | Provider |

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

Home / My Service Booking / Find

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

View Service Booking-Help ?

Find a Participant **▲ Refine Search** **Search**

Booking Number Status **Include All**

Initiated By Quote ID

Search Results
599 Results found Sort By Service Booking Number

| Service Booking Number | Quote ID | Service Booking Type | Participant Name (NDIS Number) | Start Date | End Date | Submitted Date | Service Booking Status | Initiated By |
|--------------------------|---------------|----------------------|--|------------|------------|----------------|------------------------|--------------|
| 55011915 | Not available | Standard Booking | Agency Que Quotation (430243588) | 17/03/2021 | 17/04/2021 | 17/03/2021 | Active | Provider |
| 55011797 | Not available | Plan Managed | Plan Dee Bee Managed Testing (430252861) | 11/03/2021 | 13/03/2021 | 11/03/2021 | Inactive | Provider |

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 | Quote ID | Start Date | End Date | Revised End Date | Total | In-Kind Program | Status |
|---------------------------------------|-----------------|----------|------------------|------------|------------|------------------------|----------|--------------------|------------------|
| Test ParticipantNew (430253030) | Plan Managed | 55010786 | Not available | 23/11/2020 | 23/11/2021 | - | \$112.73 | - | 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 | Consumables | 03_091_0121_1_1 | Telephone Or Video Interpreting | 1 | 1 | \$112.73 | \$100.00 | \$100.00 | \$112.73 |

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 *:

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 | Quote ID | Start Date | End Date | Revised End Date | Total | In-Kind Program | Status |
|---------------------------------------|-----------------|----------|------------------|------------|------------|------------------------|----------|--------------------|------------------|
| Test ParticipantNew (430253030) | Plan Managed | 55010786 | Not available | 23/11/2020 | 23/11/2021 | - | \$112.73 | - | 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 | Consumables | 03_091_0121_1_1 | Telephone Or Video Interpreting | 1 | 1 | \$112.73 | \$100.00 | \$100.00 | \$112.73 |

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 | Quote ID | Start Date | End Date | Revised End Date | Total | In-Kind Program | Status |
|---------------------------------------|-----------------|----------|------------------|------------|------------|------------------------|----------|--------------------|------------------|
| Test ParticipantNew (430253030) | Plan Managed | 55010786 | Not available | 23/11/2020 | 23/11/2021 | - | \$112.73 | - | 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 | Consumables | 03_091_0121_1_1 | Telephone Or Video Interpreting | 1 | 1 | \$112.73 | \$100.00 | \$100.00 | \$112.73 |

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 | Quote ID | Start Date | End Date | Revised End Date | Total | In-Kind Program | Status |
|---------------------------------------|-----------------|----------|------------------|------------|------------|------------------------|----------|--------------------|------------------|
| Test ParticipantNew (430253030) | Plan Managed | 55010786 | Not available | 23/11/2020 | 23/11/2021 | - | \$112.73 | - | 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 | Consumables | 03_091_0121_1_1 | Telephone Or Video Interpreting | 1 | 1 | \$112.73 | \$100.00 | \$100.00 | \$112.73 |

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 * :

Reason for Rejection * :

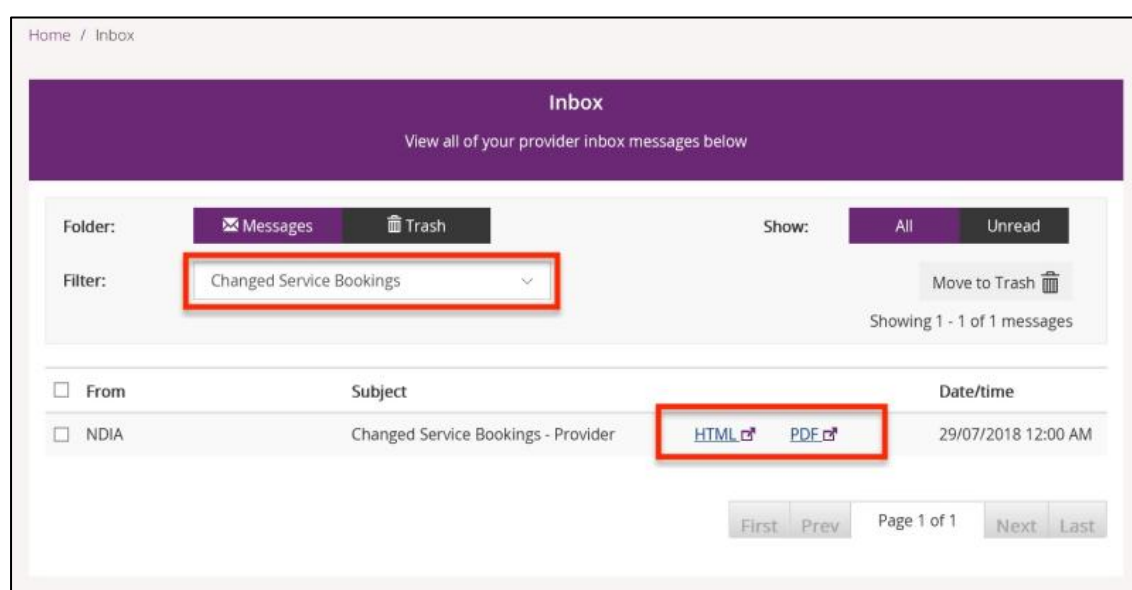
Rejection Explanation * :

255 characters remaining

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

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 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. In the View Support Booking Details, select **Update Allocation**.

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 | Quote ID | Start Date | End Date | Revised End Date | Total | In-Kind Program | Status |
|--|---------------------|----------|------------------|------------|------------|------------------------|---------|--------------------|--------|
| Agency Que Quotation (430243588) | Standard Booking | 55011915 | Not available | 17/03/2021 | 10/05/2021 | - | \$50.00 | - | Active |

Support Details

| No. | Support Budget | Support Item Number | Support Item Name | Quantity | Allocated Amount (Unit Price) | Remaining Amount |
|-----|-------------------|---------------------|-------------------|----------|----------------------------------|------------------|
| 1 | CB Daily Activity | - | - | 1 | \$50.00 | \$50.00 |

Back

Delete
Update Allocation
Update End date

3. 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 / Request 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 |
|-------------------------------------|------------------|----------|------------|------------|---------------------|---------|-----------------|--------|
| Agency Que Quotation (430243588) | Standard Booking | 55011915 | 17/03/2021 | 10/05/2021 | - | \$50.00 | - | Active |

Support Details

| No. | Support Budget | Support Item Number | Support Item Name | Quantity | Allocated Amount (Unit Price) | Remaining Amount |
|-----|----------------------|------------------------|----------------------|--------------------------------|--------------------------------------|---------------------|
| 1 | CB Daily Activity | - | - | <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

4. 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.



IMPORTANT ACTIONS REGARDING END DATES

When you end the service booking you need to review:

1. All payment requests are up to date.
2. Accrued amounts are enough to cover any outstanding payment requests which you are yet to request payment for (which are yet to be submitted).

1. Follow the steps outlined under **View Service Bookings** above.

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 | Quote ID | Start Date | End Date | Revised End Date | Total | In-Kind Program | Status |
|--|---------------------|----------|------------------|------------|------------|------------------------|---------|--------------------|--------|
| Agency Que Quotation (430243588) | Standard Booking | 55011915 | Not available | 17/03/2021 | 10/05/2021 | - | \$50.00 | - | Active |

Support Details

| No. | Support Budget | Support Item Number | Support Item Name | Quantity | Allocated Amount (Unit Price) | Remaining Amount |
|-----|-------------------|---------------------|-------------------|----------|----------------------------------|------------------|
| 1 | CB Daily Activity | - | - | 1 | \$50.00 | \$50.00 |

[Back](#)
[Delete](#)
[Update Allocation](#)
[Update End date](#)

2. Select **Update End Date**

The Update End date 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.

Note: If you want to change a service booking end date to today's 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 Change**, select from the drop-down 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 / Request End Date Change

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 |
|----------------------------------|----------------------|------------------------|------------|------------------|------------------------|------------------------|--------|
| Agency Que Quotation (430243588) | Standard Booking | 55011915 | 17/03/2021 | 10/05/2021 | \$50.00 | \$50.00 | Active |

Update End Date

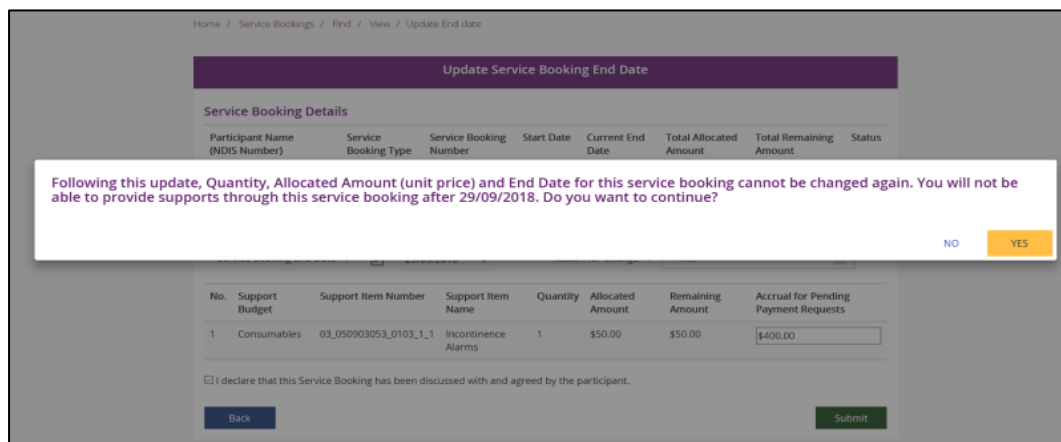
Service Booking End Date *:  18/03/2021 Reason for Change *: Select one

| No. | Support Budget | Support Item Number | Support Item Name | Quantity | Allocated Amount | Remaining Amount | Accrual for Pending Payment Requests |
|-----|-------------------|---------------------|-------------------|----------|------------------|------------------|--------------------------------------|
| 1 | CB Daily Activity | - | - | 1 | \$50.00 | \$50.00 | <input type="text"/> |

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

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

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



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 |
|---|----------------------|------------------------|------------|------------------|------------------------|------------------------|--------|
| <p>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?</p> <p>NO YES</p> | | | | | | | |

| 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.

Back Submit

5. Select **Yes**.

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. Follow the steps outlined in the **View Service Bookings** above
2. Find the service booking to delete
3. In the View Service Booking Details, 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 | Quote ID | Start Date | End Date | Revised End Date | Total | In-Kind Program | Status |
|--|---------------------|----------|------------------|------------|------------|------------------------|---------|--------------------|--------|
| Agency Que Quotation (430243588) | Standard Booking | 55011915 | Not available | 17/03/2021 | 10/05/2021 | - | \$50.00 | - | Active |

Support Details

| No. | Support Budget | Support Item Number | Support Item Name | Quantity | Allocated Amount (Unit Price) | Remaining Amount |
|-----|-------------------|---------------------|-------------------|----------|----------------------------------|------------------|
| 1 | CB Daily Activity | - | - | 1 | \$50.00 | \$50.00 |

[Back](#)
[Delete](#)
[Update Allocation](#)
[Update End date](#)

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.

4. Select **Yes**.

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 |
|-----------------------------------|------|--------|------------|----------|------------------------|-------|--------------------|--------|
| CONN (4302) | | | | | | | | 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 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](#)

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.

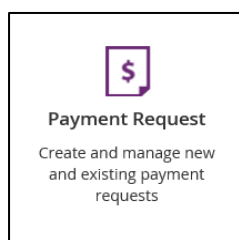


IMPORTANT NOTES ABOUT PAYMENT REQUEST

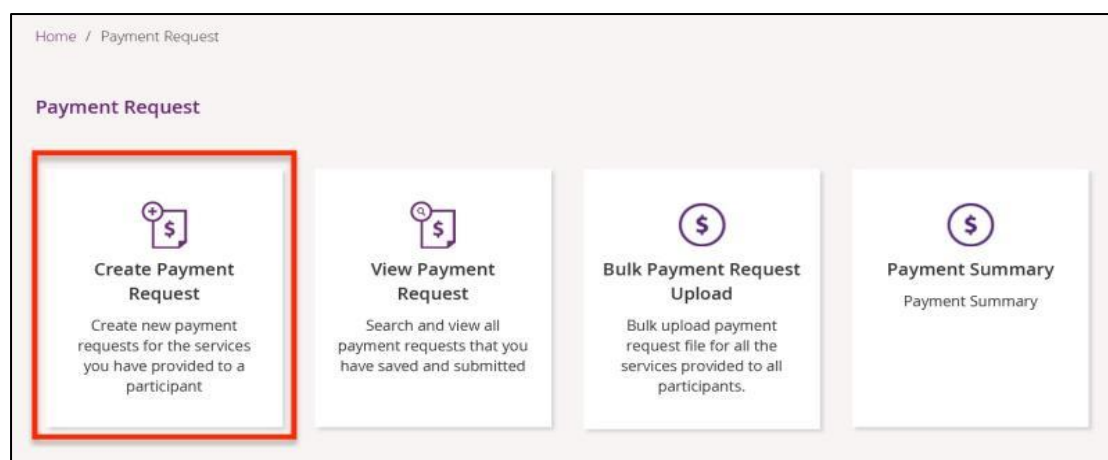
- You will need to have provided your bank account details to NDIS before a payment request can be created. Usually, you would have recorded your bank account details in the myplace portal after registering with NDIS (please see Bank Account Details section).
- You are encouraged to request payment for services provided to participants within 90 days of service. Payment requests made after 90 days may cause a delay in payment.
- Service bookings are created to hold/quarantine the funds for which providers can claim through payment requests.
- Before submitting a payment request, check your service booking details to ensure: there is sufficient funding, service booking dates are within the plan dates, support category or line item are correct.
- Once checked, payment requests can be created and must align with that service booking.
- 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)

Create a payment request

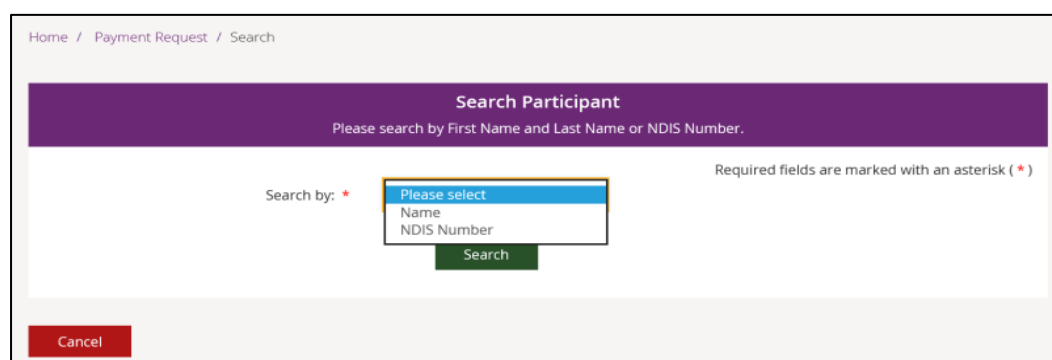
1. Select the **Payment Request** tile on the **myplace** home page.



2. Select **Create Payment Request**.

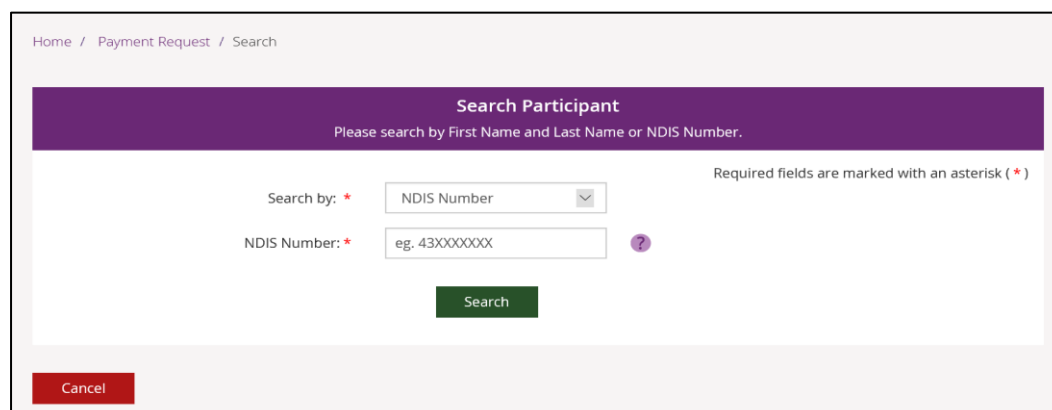


3. Search for the participant you have provided services for. You can search for the participant by their first or last **Name** or **NDIS Reference Number**. Choose how you want to search by selecting the drop-down menu.



The screenshot shows the 'Search Participant' form. The breadcrumb trail is 'Home / Payment Request / Search'. The title is 'Search Participant'. The instruction is 'Please search by First Name and Last Name or NDIS Number.' There is a 'Search by: *' label and a dropdown menu with options 'Please select', 'Name', and 'NDIS Number'. A 'Search' button is below the dropdown. A 'Cancel' button is at the bottom left. A note on the right says 'Required fields are marked with an asterisk (*)'.

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 screenshot shows the 'Search Participant' form. The breadcrumb trail is 'Home / Payment Request / Search'. The title is 'Search Participant'. The instruction is 'Please search by First Name and Last Name or NDIS Number.' There is a 'Search by: *' label and a dropdown menu with 'NDIS Number' selected. Below it is an 'NDIS Number: *' label and a text input field with 'eg. 43XXXXXXX' and a question mark icon. A 'Search' button is below the input field. A 'Cancel' button is at the bottom left. A note on the right says 'Required fields are marked with an asterisk (*)'.

5. From the search results, select the relevant participant's 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

Search Results

| Participant Name | NDIS Number |
|----------------------------------|-------------|
| Mr. Henry Donald | 430254456 |

Cancel

- The **New Payment Request** window appears. Required fields are marked with a red asterisk (*).

New Payment Request

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

Participant Details

Participant Name: Mr. Henry Donald
NDIS Number: 430254456

Payment Request Details

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

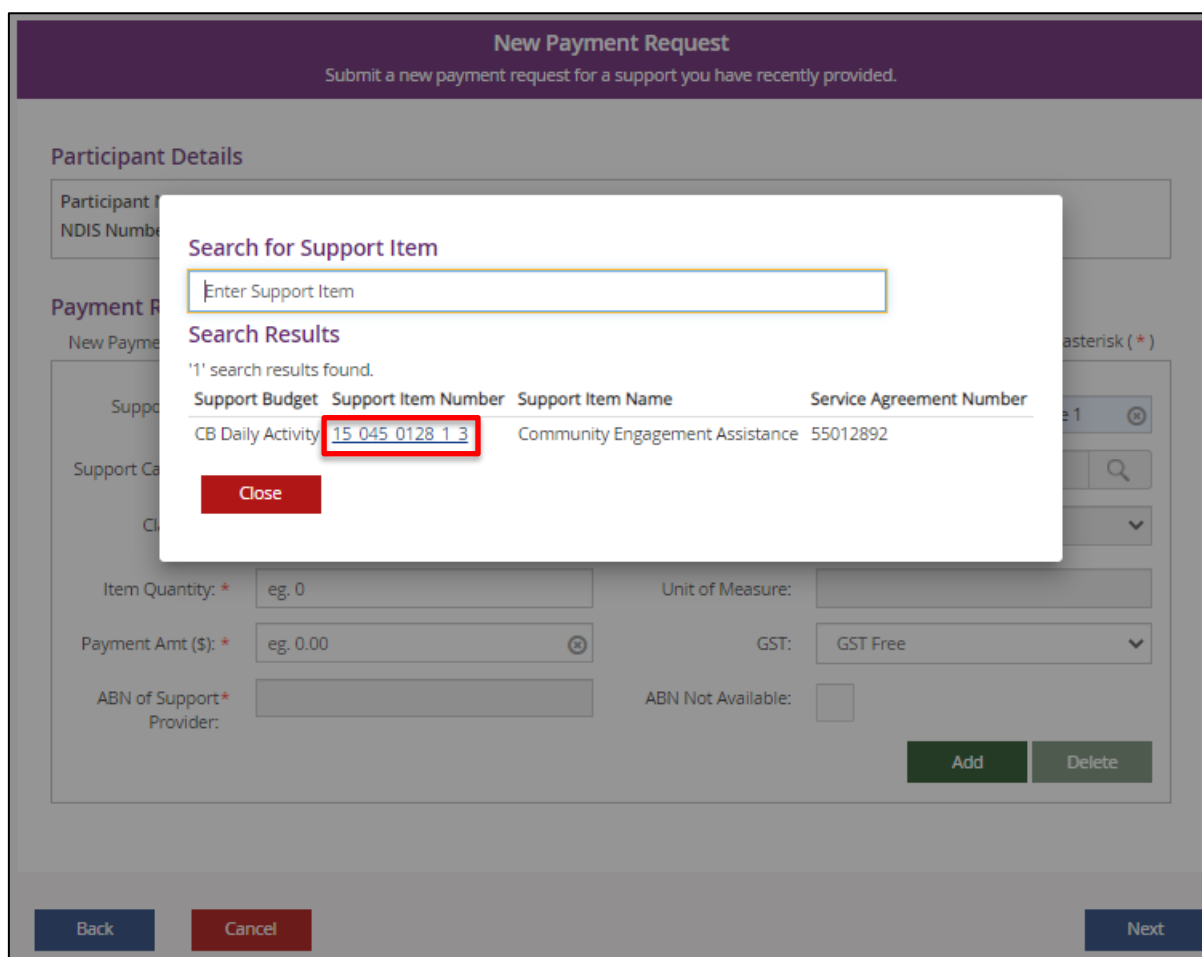
| | | |
|--|---|--|
| Support Start Date: * <input type="text" value="09/11/2021"/> | Support End Date: * <input type="text" value="09/11/2021"/> | Invoice Number: * <input type="text" value="Invoice 1"/> |
| Support Category: * <input type="text" value="CB Daily Activity"/> | Item Number: * <input type="text"/> | Cancellation Reason: <input type="text"/> |
| Claim Type: <input type="text" value="Direct service"/> | Unit of Measure: <input type="text"/> | GST: <input type="text" value="GST Free"/> |
| Item Quantity: * <input type="text" value="eg. 0"/> | Payment Amt (\$): * <input type="text" value="eg. 0.00"/> | ABN of Support Provider: <input type="text"/> |
| ABN Not Available: <input type="checkbox"/> | | |

Add **Delete**

Back **Cancel** **Next**

- Complete the **Support Start Date** and **Support End Date** fields.
- 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.

9. Select a support category from the **Support Category** drop-down.
10. Select the **Item Number** magnifying glass icon to search for the item number. Then select the **Support item number** for the item you wish to submit a payment request for.



The screenshot shows the 'New Payment Request' form in the NDIS provider portal. A modal window titled 'Search for Support Item' is open, displaying search results for the item number '15 045 0128 1 3'. The modal includes a search input field, a 'Search Results' section with a table of results, and a 'Close' button. The background form is partially visible, showing fields for Participant Details, Payment Request, and Item Details.

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

Participant Details

Participant ID: []
NDIS Number: []

Payment Request

New Payment Request: []

Support Category: []

Support Category: []

Item Quantity: * [eg. 0] Unit of Measure: []

Payment Amt (\$): * [eg. 0.00] GST: [GST Free]

ABN of Support Provider: * [] ABN Not Available: []

Search for Support Item

Enter Support Item

Search Results

'1' search results found.

| Support Budget | Support Item Number | Support Item Name | Service Agreement Number |
|-------------------|---------------------|---------------------------------|--------------------------|
| CB Daily Activity | 15 045 0128 1 3 | Community Engagement Assistance | 55012892 |

Close

Back Cancel Next

11. Select the **Claim Type**. Refer to the NDIS Pricing Arrangements and Price Limits for further information on each claim type.
 - The 'Irregular SIL Supports' claim type should be used when a SIL support is provided in unexpected or unplanned circumstances.
 - The 'Telehealth' claim field should be used when a support is provided as needed and with agreement from the participant.

12. If the **Claim Type** is cancellation, select a cancellation reason.

Cancellation Charges

No show due to family issues

No show due to health reason

Other

No show due to unavailability of transport

13. Enter your **Item Quantity**. This may be either in line with how many hours or the number of services/support you have provided, consistent with the way you set up the service booking (i.e. if you want to request payment for 1 hour and 45 min you will need to enter 1.75 or if you are requesting payment for one product or service, you will enter 1).

14. Complete the **Payment Amount** field. This is the total amount being requested; it is not the unit price amount.

15. In the **ABN of Support Provider** field, enter the Australian Business Number (ABN) of the provider of the support or service.

ABN of Support*
 Provider:

ABN Not Available:

- To be valid, an ABN must have 11 digits. ABN's are required for both registered and unregistered provider payment requests.
- For a plan managed service booking claim you will need to complete the **ABN of Support Provider** field manually.
- If the provider has a valid reason for not providing an ABN, plan managers will have the option to:

Tick the '**ABN Not Available**' checkbox and select either the '**ATO Excluded Supply**' or '**Participant Reimbursement**' in the '**ABN Exemption Reason**' dropdown box for single payments

Note: If a supplier is exempt from quoting an ABN under ATO rules (i.e. 'ATO excluded supply'), plan managers must ensure that:

- the supplier provides a completed ATO Statement by a supplier form stating why they are exempt from providing an ABN
- a valid tax invoice is included with all relevant information about the goods or services provided.

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. Henry Donald
NDIS Number: 430254456

Payment Request Details

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

| | | |
|------------------------------------|--|---------------------------|
| Support Start Date: 20/05/2021 | Support End Date: 20/05/2021 | Invoice Number: Invoice 1 |
| Support Category: Daily Activities | Item Number: 01_049_0104_1_1 | Cancellation Reason: |
| Claim Type: Direct service | Unit of Measure: each | GST: GST Free |
| Item Quantity: eg. 0 | Payment Amt (\$): eg. 0.00 | ABN of Support Provider: |
| ABN Exemption Reason: | ABN Not Available: <input checked="" type="checkbox"/> | |

ATO Excluded Supply
Participant Reimbursement

Add Delete

Back Cancel Next

- If you are making a claim against a standard service booking, the ABN of the registered provider (that is, your ABN) automatically appears and is not editable.

16. If you need to add more items for this participant, select **Add** to enter them.

To delete a line in a payment request, select **Delete**.

Home / Payment Request / Search / New Payment Request

New Payment Request

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


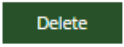
Participant Details

Participant Name: Mr. Henry Donald
NDIS Number: 430254456


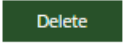
Payment Request Details




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

| | | |
|-------------------------------------|-----------------------------------|-------------------------------------|
| Support Start * Date: 31/05/2021 | Support End Date: * 31/05/2021 | 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 | |
| ABN of Support * Provider: | ABN Not Available: | |

| | | |
|-------------------------------------|-----------------------------------|-------------------------------------|
| 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 | |
| ABN of Support * Provider: | ABN Not Available: | |

17. Select **Next** to continue to the next step.

18. On the **Review Payment Request** page, check the details of the payment request, including the support dates, claim type and ABN number.

If the payment request details are correct, select the mandatory NDIS Pricing Arrangements and Price Limit text acknowledgements checkbox at the bottom of the screen.

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

Participant Details

Participant Name: Mr. Henry Donald
 NDIS Number: 430254456

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 | ABN/ABN Exemption Reason |
|---|-----------------------|---------------------|-------------------|---------------------|----------------|---------------------|---------------|-----------------|----------------|----------|----------------|--------------------------|
| 1 | 09/11/2021 | 09/11/2021 | CB Daily Activity | 15_045_0128_1_3 | Direct service | | 1 | Hour | \$1.00 | GST Free | Invoice 1 | 81612420750 |

Payment Request Amount Summary

| Support Category | Total Claim Amount |
|--------------------|--------------------|
| CB Daily Activity | \$1.00 |
| Grand Total | \$1.00 |

* ☐ I acknowledge this payment request is consistent with the requirements stated within the NDIS Pricing Arrangements and Price Limits.

Back


Cancel

Submit


19. 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**.
- You will receive a confirmation once your payment request has been submitted.

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


 You have successfully submitted your payment requests for processing.

Claim Details

| # | Payment Request Number | Support Category | Item Number | Claim Type | Cancellation Reason | Payment Amount | GST | Status | Reject Reason |
|---|--|-------------------|-----------------|----------------|---------------------|----------------|----------|-----------------|---------------|
| 1 | 10597422  | CB Daily Activity | 15_045_0128_1_3 | Direct service | | \$1.00 | GST Free | Pending Payment | |

[View Payment Requests](#)

Note: You can view the Payment Request by selecting the hyperlink to navigate to the View Payment Request screen.

Create a payment request for an Irregular SIL Support

Irregular supports are considered separately from the regular SIL plan value and should be used when a SIL support is provided in unexpected or unplanned circumstances and additional funding to cover the costs is needed.

Participants have separate funding in the SIL plan for irregular supports that can be claimed for each time funding is required.

1. Follow the steps outline under [View Service Bookings](#), pages 65 to 70.
2. Select your Irregular SIL support service booking.

Find

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

View Service Booking-Help ?

Find a Participant

Enter participant name or NDIS number

▼ Refine Search

Search

Search Results

2,814 Results found

Sort By Service Booking Number ▼

| Service Booking Number | Quote ID | Service Booking Type | Participant Name (NDIS Number) | Start Date | End Date | Submitted Date | Service Booking Status | Initiated By |
|--------------------------|---------------|----------------------|--------------------------------|------------|------------|----------------|------------------------|--------------|
| 55017870 | Not available | Standard Booking | Ignatio Testcase6 (430195570) | 02/11/2021 | 02/11/2023 | 25/11/2021 | Active | Provider |
| 55017869 | Not available | Standard Booking | Ignatio Testcase6 (430195570) | 02/11/2021 | 02/11/2023 | 25/11/2021 | Active | Provider |

Irregular service booking

Regular service booking

The details of the service booking will display.

3. In the **View Support Booking Details**, select **Update Allocation**.

View Service Booking Details

Detailed view of the selected service booking

Service Booking Details

| Participant Name (NDIS Number) | Type | Number | Quote ID | Start Date | End Date | Revised End Date | Total | In-Kind Program | Status |
|--------------------------------|------------------|----------|---------------|------------|------------|------------------|------------|-----------------|--------|
| Ignatio Testcase6 (430195570) | Standard Booking | 55017870 | Not available | 02/11/2021 | 02/11/2023 | - | \$4,000.00 | - | Active |

Support Details

| No. | Support Budget | Support Item Number | Support Item Name | Quantity | Allocated Amount (Unit Price) | Remaining Amount |
|-----|------------------|---------------------|------------------------------------|----------|-------------------------------|------------------|
| 1 | Daily Activities | 01_819_0115_1_1 | Funding for Irregular SIL supports | 4,000 | \$1.00 | \$4,000.00 |

Back

Delete

Update Allocation

Update End date

4. Reduce the **Quantity** by the amount of additional funding required. Check the **Declaration** to confirm that the service booking reflects what you have discussed and agreed with the participant.

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 |
|-----------------------------------|------------------|----------|------------|------------|---------------------|------------|-----------------|--------|
| Ignatio Testcase6 (430195570) | Standard Booking | 55017870 | 02/11/2021 | 02/11/2023 | - | \$4,000.00 | - | Active |

Support Details

| No. | Support Budget | Support Item Number | Support Item Name | Quantity | Allocated Amount (Unit Price) | Remaining Amount |
|-----|------------------|---------------------|------------------------------------|--|--|------------------|
| 1 | Daily Activities | 01_819_0115_1_1 | Funding for Irregular SIL supports | <input style="border: 2px solid red;" type="text" value="3500"/> | <input style="border: 2px solid red;" type="text" value="\$1.00"/> | \$4,000.00 |

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

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

5. Select Submit.

Your details have been updated successfully.

[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 | Quote ID | Start Date | End Date | Revised End Date | Total | In-Kind Program | Status |
|-----------------------------------|------------------|----------|---------------|------------|------------|---------------------|------------|-----------------|--------|
| Ignatio Testcase6 (430195570) | Standard Booking | 55017870 | Not available | 02/11/2021 | 02/11/2023 | - | \$3,500.00 | - | Active |

Support Details

| No. | Support Budget | Support Item Number | Support Item Name | Quantity | Allocated Amount (Unit Price) | Remaining Amount |
|-----|------------------|---------------------|------------------------------------|----------|----------------------------------|------------------|
| 1 | Daily Activities | 01_819_0115_1_1 | Funding for Irregular SIL supports | 3,500 | \$1.00 | \$3,500.00 |

[Back](#)

[Delete](#)
[Update Allocation](#)
[Update End date](#)

Note: You will notice that **Remaining Amount** has been reduced.

6. Return to the [View Service Bookings](#), pages 65 to 70

7. Select your Regular SIL support service booking

Find

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

View Service Booking-Help ?

Find a Participant

Enter participant name or NDIS number

▼ Refine Search

Search

Search Results

2,814 Results found

Sort By

Service Booking Number ▼

| Service Booking Number | Quote ID | Service Booking Type | Participant Name (NDIS Number) | Start Date | End Date | Submitted Date | Service Booking Status | Initiated By |
|--------------------------|---------------|----------------------|--------------------------------|------------|------------|----------------|------------------------|--------------|
| 55017870 | Not available | Standard Booking | Ignatio Testcase6 (430195570) | 02/11/2021 | 02/11/2023 | 25/11/2021 | Active | Provider |
| 55017869 | Not available | Standard Booking | Ignatio Testcase6 (430195570) | 02/11/2021 | 02/11/2023 | 25/11/2021 | Active | Provider |

Irregular service booking

Regular service booking

The details of the service booking will display.

8. In the [View Support Booking Details](#), select **Update Allocation**.

View Service Booking Details

Detailed view of the selected service booking

Service Booking Details

| Participant Name (NDIS Number) | Type | Number | Quote ID | Start Date | End Date | Revised End Date | Total | In-Kind Program | Status |
|--------------------------------|------------------|----------|---------------|------------|------------|------------------|-------------|-----------------|--------|
| Ignatio Testcase6 (430195570) | Standard Booking | 55017869 | Not available | 02/11/2021 | 02/11/2023 | - | \$40,000.00 | - | Active |

Support Details

| No. | Support Budget | Support Item Number | Support Item Name | Quantity | Allocated Amount (Unit Price) | Remaining Amount |
|-----|------------------|---------------------|-------------------|----------|-------------------------------|------------------|
| 1 | Daily Activities | - | - | 1 | \$40,000.00 | \$40,000.00 |

Back

Delete

Update Allocation

Update End date

9. Increase the value of the **Allocated Amount** by the amount taken from the irregular service booking. Check the **Declaration** to confirm that the service booking reflects what you have discussed and agreed with the participant

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 |
|-----------------------------------|------------------|----------|------------|------------|---------------------|-------------|-----------------|--------|
| Ignatio Testcase6 (430195570) | Standard Booking | 55017869 | 02/11/2021 | 02/11/2023 | - | \$40,000.00 | - | Active |


Support Details

| No. | Support Budget | Support Item Number | Support Item Name | Quantity | Allocated Amount (Unit Price) | Remaining Amount |
|-----|------------------|---------------------|-------------------|--------------------------------|--|------------------|
| 1 | Daily Activities | - | - | <input type="text" value="1"/> | <input type="text" value="\$40,500.00"/> | \$40,000.00 |

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

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

10. Select **Submit**

 Your details have been updated successfully.

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 | Quote ID | Start Date | End Date | Revised End Date | Total | In-Kind Program | Status |
|-----------------------------------|------------------|----------|---------------|------------|------------|---------------------|-------------|-----------------|--------|
| Ignatio Testcase6 (430195570) | Standard Booking | 55017869 | Not available | 02/11/2021 | 02/11/2023 | - | \$40,500.00 | - | Active |

Support Details

| No. | Support Budget | Support Item Number | Support Item Name | Quantity | Allocated Amount (Unit Price) | Remaining Amount |
|-----|------------------|---------------------|-------------------|----------|----------------------------------|------------------|
| 1 | Daily Activities | - | - | 1 | \$40,500.00 | \$40,500.00 |

[Back](#)

[Delete](#)
[Update Allocation](#)
[Update End date](#)

Note: You will notice that **Remaining Amount** has been increased.

11. Create a new payment request following the steps in [Create a payment request](#), pages 88 to 96.

Note: The claim type should be 'Irregular SIL Supports'.

New Payment Request

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

Participant Details

| | |
|-------------------|-----------------------|
| Participant Name: | Mr. Ignatio Testcase6 |
| NDIS Number: | 430195570 |

Payment Request Details

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

| | | | | | |
|---------------------|------------------------|--------------------------|-----------------|----------------------|-----------|
| Support Start Date: | 02/11/2021 | Support End Date: | 02/11/2021 | Invoice Number: | Invoice 1 |
| Support Category: | Daily Activities | Item Number: | 01_801_0115_1_1 | Cancellation Reason: | |
| Claim Type: | Irregular SIL Supports | Unit of Measure: | Hour | GST: | GST Free |
| Item Quantity: | 10 | ABN of Support Provider: | 36145575195 | ABN Not Available: | |
| Payment Amt (\$): | 500.00 | | | | |

[Add](#) [Delete](#)

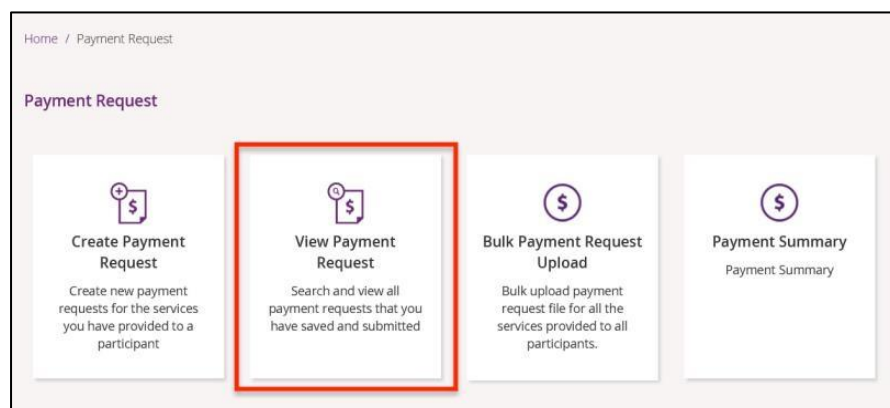
[Back](#) [Cancel](#) [Next](#)

View payment request

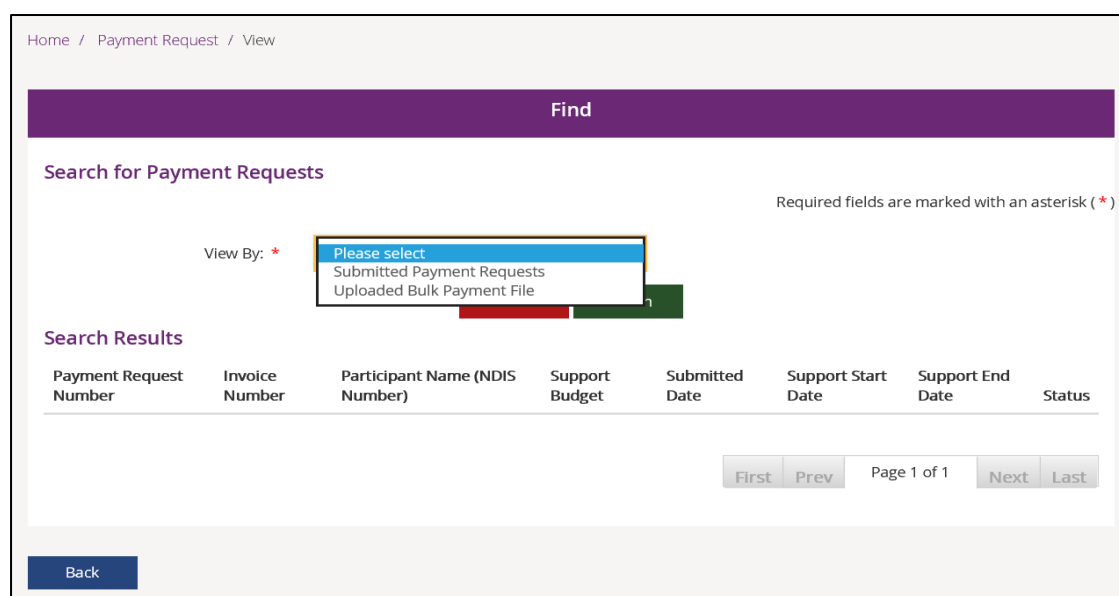
You can view a history of submitted payment requests. You can view by submitted payment requests or bulk upload files.

Submitted payment requests

1. Select **View Payment Request** on the **Payment Request** page.



- At **View By**, select **Submitted Payments Request** from the drop-down list.



- 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

- 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 | Number) | Budget | Submitted Date | Support Start Date | Support End Date | Status |
|------------------------|----------------|---------|--------|----------------|--------------------|------------------|--------|
| | | | | | | | |

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.

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

Home / Payment Request / View

Find

Search for Payment Requests

Required fields are marked with an asterisk (*)

View By: * Please select

Selected Search Criteria
NDIS Number = 430254456
[remove this criteria](#)

Reset
Search

8 Results found

| Payment Request Number | Invoice Number | Participant Name (NDIS Number) | Support Budget | Submitted Date | Support Start Date | Support End Date | Status |
|--------------------------|----------------|--------------------------------|-----------------------|----------------|--------------------|------------------|-----------------|
| 10581442 | 12345 | Henry Donald (430254456) | Assistive technology | 28/05/2021 | 26/05/2021 | 26/05/2021 | Pending Payment |
| 10581433 | 123456 | Henry Donald (430254456) | CB Daily Activity | 27/05/2021 | 21/05/2021 | 21/05/2021 | Rejected |
| 10581434 | 123456 | Henry Donald (430254456) | CB Daily Activity | 27/05/2021 | 21/05/2021 | 21/05/2021 | Paid |
| 10581176 | Invoice 1 | Henry Donald (430254456) | Assistive technology | 24/05/2021 | 21/05/2021 | 21/05/2021 | Paid |
| 10581178 | | Henry Donald (430254456) | CB Choice and Control | 24/05/2021 | 20/05/2021 | 20/05/2021 | Paid |
| 10581179 | | Henry Donald (430254456) | Assistive technology | 24/05/2021 | 20/05/2021 | 20/05/2021 | Paid |
| 10581180 | | Henry Donald (430254456) | Consumables | 24/05/2021 | 20/05/2021 | 20/05/2021 | Paid |
| 10581181 | | Henry Donald (430254456) | Initial Supports | 24/05/2021 | 20/05/2021 | 20/05/2021 | Paid |

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 |
|--------------------------------|------------------------|----------------|----------------|-----------------|
| Henry Donald (430254456) | 10581442 | \$20.00 | 12345 | Pending Payment |

Support Details

Start Date: 26/05/2021

End Date: 26/05/2021

Category: Assistive technology

Item Number: 05_220627230_0122_1_2

Item Description: Music Devices

Claim Type: Direct service

Cancellation Reason:

Submitted Amount: 20.00

Quantity: 1.00

GST: GST Free

Other Details

Plan ID: 1042353

Service Booking Number: 55012983

In-Kind Program:

Submitted on: 28/05/2021

Submitted By: GRAHAM BARRS

Reject Reason:

Paid on:

ABN of Support Provider: 81612420750

ABN Not Available: No

ABN Exemption Reason:

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

Uploaded bulk payment files

Further details on how to do this can be found in the **Bulk payment request self-help guide** on the [NDIS website](#).

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.

Note: You must be an account manager or primary contact to cancel payments.

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.

You can cancel any payment request in your payment history with a status of **Paid**.

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: *

Selected Search Criteria
 NDIS Number = 430254456
[remove this criteria](#)
 Status = Paid
[remove this criteria](#)

6 Results found

| Payment Request Number | Invoice Number | Participant Name (NDIS Number) | Support Budget | Submitted Date | Support Start Date | Support End Date | Status |
|--------------------------|----------------|--------------------------------|-----------------------|----------------|--------------------|------------------|--------|
| 10581434 | 123456 | Henry Donald (430254456) | CB Daily Activity | 27/05/2021 | 21/05/2021 | 21/05/2021 | Paid |
| 10581176 | Invoice 1 | Henry Donald (430254456) | Assistive technology | 24/05/2021 | 21/05/2021 | 21/05/2021 | Paid |
| 10581178 | | Henry Donald (430254456) | CB Choice and Control | 24/05/2021 | 20/05/2021 | 20/05/2021 | Paid |
| 10581179 | | Henry Donald (430254456) | Assistive technology | 24/05/2021 | 20/05/2021 | 20/05/2021 | Paid |
| 10581180 | | Henry Donald (430254456) | Consumables | 24/05/2021 | 20/05/2021 | 20/05/2021 | Paid |
| 10581181 | | Henry Donald (430254456) | Initial Supports | 24/05/2021 | 20/05/2021 | 20/05/2021 | Paid |

First Prev Page 1 of 1 Next Last

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 |
|--------------------------------|------------------------|----------------|----------------|--------|
| Henry Donald (430254456) | 10581434 | \$25.00 | 123456 | Paid |

Support Details

Start Date: 21/05/2021

End Date: 21/05/2021

Category: CB Daily Activity

Item Number: 15_045_0128_1_3

Item Description: Community Engagement Assistance

Claim Type: Direct service

Cancellation Reason:

Submitted Amount: 25.00

Quantity: 1.00

GST: GST Free

Other Details

Plan ID: 1042353

Service Booking Number: 55012892

In-Kind Program:

Submitted on: 27/05/2021

Submitted By: GRAHAM BARRS

Reject Reason:

Paid on: 28/05/2021

ABN of Support Provider:

ABN Not Available: Yes

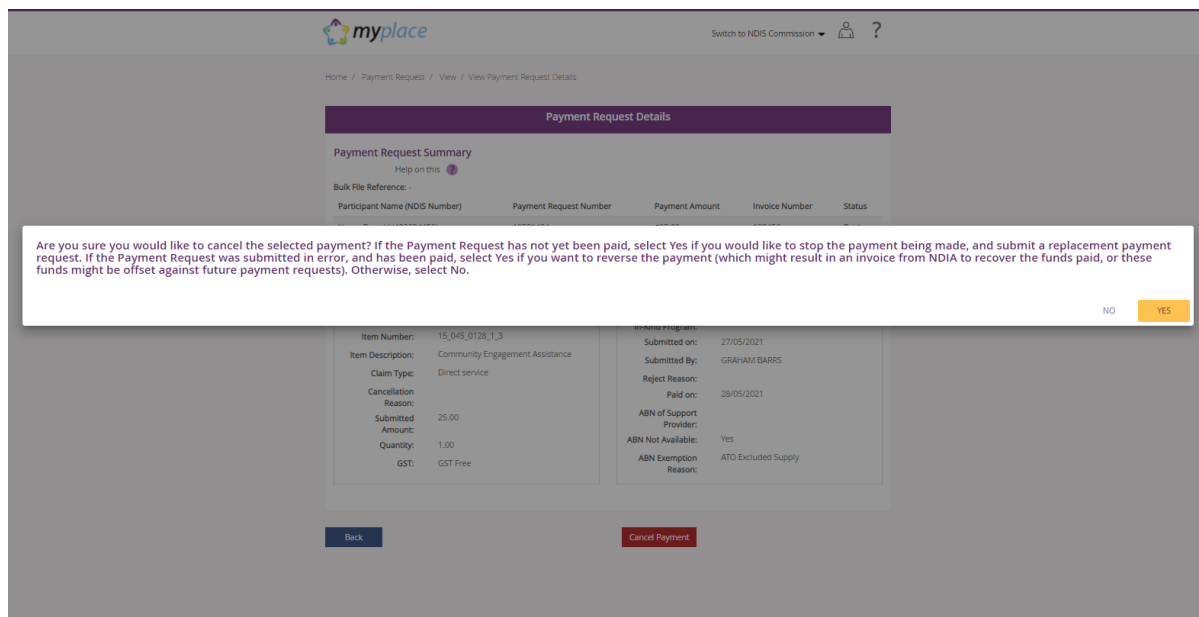
ABN Exemption Reason: ATO Excluded Supply

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**.

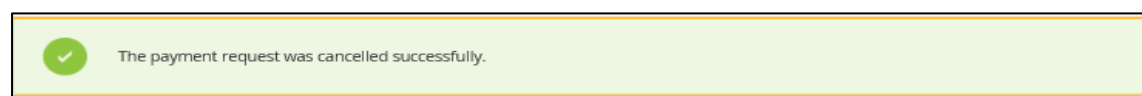


The screenshot shows the 'myplace' provider portal interface. At the top, there's a navigation bar with 'myplace' logo and a 'Switch to NDIS Commission' dropdown. Below it, a breadcrumb trail reads 'Home / Payment Request / View / View Payment Request Details'. The main content area is titled 'Payment Request Details' and contains a 'Payment Request Summary' section. A modal dialog is open in the center, asking for confirmation to cancel a payment. The modal text states: 'Are you sure you would like to cancel the selected payment? If the Payment Request has not yet been paid, select Yes if you would like to stop the payment being made, and submit a replacement payment request. If the Payment Request was submitted in error, and has been paid, select Yes if you want to reverse the payment (which might result in an invoice from NDIA to recover the funds paid, or these funds might be offset against future payment requests). Otherwise, select No.' There are 'NO' and 'YES' buttons at the bottom right of the modal. In the background, a table lists payment request details:

| Participant Name (NDIS Number) | Payment Request Number | Payment Amount | Invoice Number | Status |
|--------------------------------|---------------------------------|----------------|----------------|--------|
| 15,045,0128,1,3 | Community Engagement Assistance | Direct service | | |
| Reason: | Submitted Amount: | 25.00 | | |
| Quantity: | 1.00 | | | |
| GST: | GST Free | | | |

Below the table, there are 'Back' and 'Cancel Payment' buttons.

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



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.

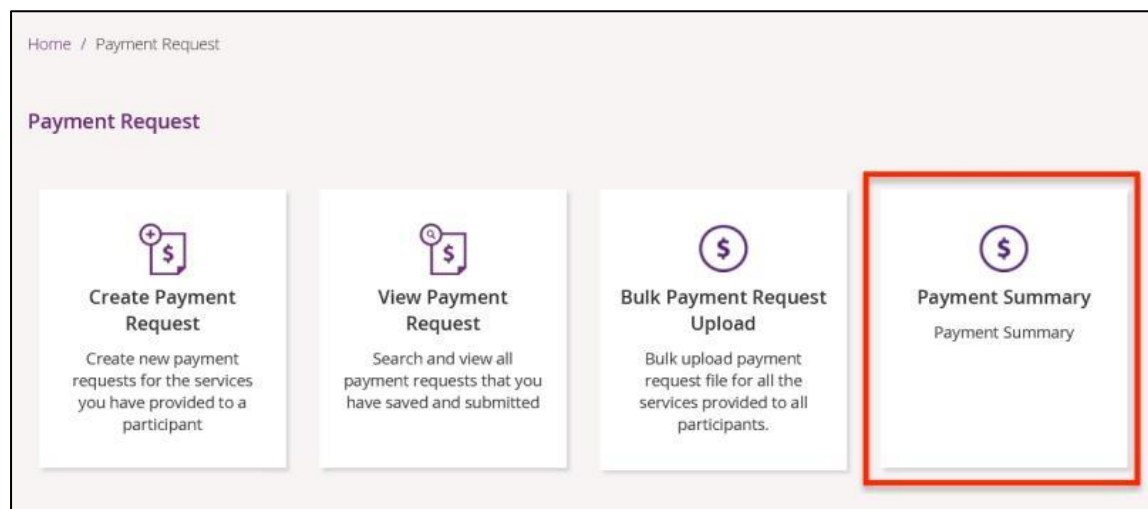
Further details on how to do this can be found in the **Bulk payment request self-help guide** on the [NDIS website](https://www.ndis.gov.au).

Payment summary

You can view a summary of the payment requests and advance payments through **Payment Summary**. The payment requests summary can be up to a 30 day period and includes

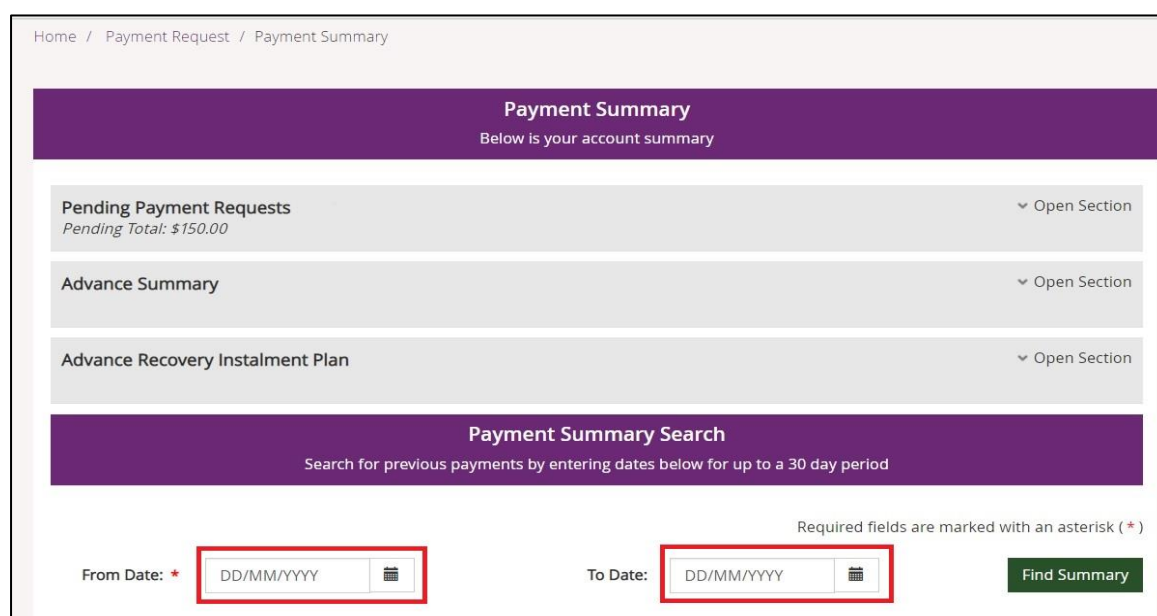
cleared (received) payments, pending payments, rejected payments and bulk upload file payments.

1. Select **Payment Summary** on the **Payment Request** page.



2. 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.



The screenshot shows the 'Payment Summary' page with a breadcrumb trail 'Home / Payment Request / Payment Summary'. Below the title, there is a section 'Below is your account summary' with three expandable sections: 'Pending Payment Requests', 'Advance Summary', and 'Advance Recovery Instalment Plan'. Below these is a 'Payment Summary Search' section with the text 'Search for previous payments by entering dates below for up to a 30 day period'. At the bottom, there are two date input fields: 'From Date: *' and 'To Date: *', both with a calendar icon. The 'From Date' field is highlighted with a red border. A 'Find Summary' button is located to the right of the date fields. A note at the top right of the date fields states 'Required fields are marked with an asterisk (*)'.

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

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 |
| <div style="font-size: small;"> Your Invoice Number: 1234567890098765432 Support Start Date: 27/09/2018 Support End Date: 27/09/2018 Support Category: Consumables Item Number: 03_050903053_0103_1_1 Item Description: Incontinence Alarms Claim Type: Standard Cancellation Reason: Submitted by: GRAHAM JONES </div> | | | | |
| 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 |

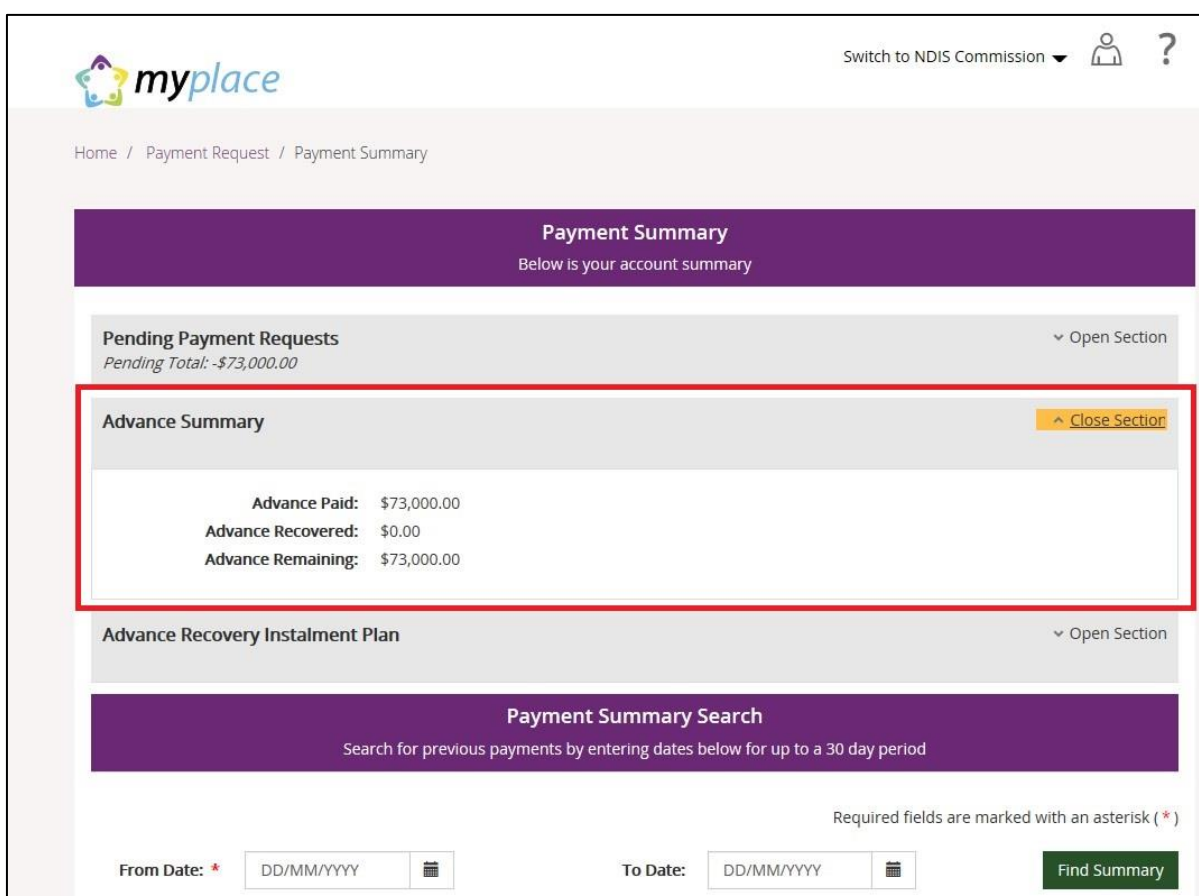
First
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Page 1 of 1
Next
Last

Advance summary and recovery instalment plan

If you have received an advance payment and a recovery instalment plan is in place, the **Advance Recovery** and **Advance Recovery Instalment Plan** sections let you view how much you currently owe and the value of the instalments.

1. Go to **Advance Summary** and select **Open Section**.

The section displays a summary of the total amount paid to you, the total amount recovered and the total amount remaining to be paid by you.



The screenshot shows the 'myplace' provider portal interface. At the top, there's a navigation bar with the 'myplace' logo and a 'Switch to NDIS Commission' link. Below this is a breadcrumb trail: 'Home / Payment Request / Payment Summary'. The main content area is titled 'Payment Summary' with the subtitle 'Below is your account summary'. It contains three sections: 'Pending Payment Requests' (with a 'Pending Total: -\$73,000.00' and an 'Open Section' link), 'Advance Summary' (highlighted with a red box, showing 'Advance Paid: \$73,000.00', 'Advance Recovered: \$0.00', and 'Advance Remaining: \$73,000.00' with a 'Close Section' link), and 'Advance Recovery Instalment Plan' (with an 'Open Section' link). At the bottom, there's a 'Payment Summary Search' section with a text input for dates and a 'Find Summary' button. A note at the bottom right states 'Required fields are marked with an asterisk (*)'.

2. Go to **Advance Recovery Instalment Plan** and select **Open Section**.

The section displays a detailed table of each instalment in the recovery plan by recovery date, recovery instalment amount, recovered amount and remaining amount.

Home / Payment Request / Payment Summary

Payment Summary

Below is your account summary

Pending Payment Requests

Pending Total: -\$73,000.00

Open Section

Advance Summary

Open Section

Advance Recovery Instalment Plan

Close Section

| Recovery Start Date | Recovery Instalment Amount | Recovered Amount | Remaining Amount |
|---------------------|----------------------------|------------------|------------------|
| 24/08/2020 | \$12,166.00 | \$0.00 | \$12,166.00 |
| 31/08/2020 | \$12,166.00 | \$0.00 | \$12,166.00 |
| 01/09/2020 | \$12,166.00 | \$0.00 | \$12,166.00 |
| 02/09/2020 | \$12,166.00 | \$0.00 | \$12,166.00 |
| 03/09/2020 | \$12,166.00 | \$0.00 | \$12,166.00 |
| 04/09/2020 | \$12,170.00 | \$0.00 | \$12,170.00 |

Payment Summary Search

Search for previous payments by entering dates below for up to a 30 day period

If you have any questions or concerns about advance recovery, contact NDIS at advance.payment1@ndis.gov.au.

Quotations



IMPORTANT NOTE FOR APPROVED QUOTES:

When NDIS approves your quote, you don't need to create the related service booking, it is created automatically for you.

You will receive a message in your **Inbox** informing you that the service booking has been created.

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 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.

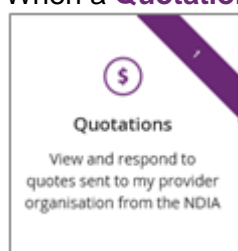
Note: You can view the Quote ID of an approved quote in the 'Find' screen for service bookings and select the hyperlink to navigate you to Quotation screen.

This section allows you to view, respond to and manage quotes.

View a quote

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. The results will be organised under the following column headers:

- **Find a participant:** Enter either the participant name or their NDIS number.
- **Sort by:** Select an option from the drop-down list to sort the list by the column headers.
- **Quote ID:** The list of quotations requested by NDIA.

- **Participant name (NDIS number):** The name and NDIS number of the participant that the quotation relates to.
 - **Date requested:** The date the quotation was requested by NDIA.
 - **Quote type:** Shows the type of quotation.
 - **Description:** Describes the item.
 - **Item:** Shows the item number.
 - **Status:** Shows the status of the quotation as one of the following:
 - Awaiting provider response
 - NDIA has received response
 - Quote has expired
 - Archived
 - Quote is accepted
 - Quote was unsuccessful
 - Quotation open
2. Select **Sort by** to sort the list of quotes by any of these columns. Only one column can be sorted at a time. Use the previous / next page controls at the bottom of the page to move through the list. To return to the previous page, select **Back**.

Home / Quotations

Quotations

Below is a listing of quotations requested by the NDIA

Quotations - help ?

Find a participant ▼ Refine search Search

Search results

Showing 1 - 10 of 984 quotations Sort by

| Quote ID | Participant name (NDIS number) | Date requested | Quote type | Description | Item | Status |
|-------------------------|--|----------------|-----------------------------|---|-----------------------|-------------------|
| 5005219 | Two Three Greater One Twenty (430253762) | 16/03/2021 | Assistive - Repair | Supported Independent Living - For 6 - S | 01_038_0115_1_1 | Quote is accepted |
| 5005217 | Three One Child Mixed (430253765) | 16/03/2021 | Home Modifications - Repair | SDA Vacancy - Person-Specific Adjustment | 06_432_0131_2_2 | Quote is accepted |
| 5005216 | One Three Mixed Fungible (430253764) | 16/03/2021 | Home Modifications - Repair | Specialist Disability Accommodation (SDA) | 06_431_0131_2_2 | Quote is accepted |
| 5005215 | One Three Mixed Fungible (430253764) | 16/03/2021 | Assistive - New | Standing Frame - Child Under 5 | 05_053603010_0103_1_2 | Quote is accepted |
| 5005212 | OneTwo Three Self (430253754) | 16/03/2021 | Home Modifications - Repair | Specialist Disability Accommodation (SDA) | 06_431_0131_2_2 | Quote is accepted |
| 5005211 | OneTwo Three Self (430253754) | 16/03/2021 | Assistive - Repair | Mobile Shower Commode - Child Transporte | 05_091203055_0103_1_2 | Quote is accepted |

- To refine your search, select the **Refine Search** drop-down to display the filters you wish to search on — Quote ID, Quote type, Date requested, Status. You can enter multiple criteria to further refine the list.

Home / Quotations

Quotations

Below is a listing of quotations requested by the NDIA

Quotations - help ?

Find a participant [Refine search](#)

Quote ID Date requested

Quote type Status

Search results

Showing 1 - 10 of 984 quotations Sort by

| Quote ID | Participant name (NDIS number) | Date requested | Quote type | Description | Item | Status |
|-------------------------|--|----------------|-----------------------------|---|-----------------------|-------------------|
| 5005219 | Two Three Greater One Twenty (430253762) | 16/03/2021 | Assistive - Repair | Supported Independent Living - For 6 - S | 01_038_0115_1_1 | Quote is accepted |
| 5005217 | Three One Child Mixed (430253765) | 16/03/2021 | Home Modifications - Repair | SDA Vacancy - Person-Specific Adjustment | 06_432_0131_2_2 | Quote is accepted |
| 5005216 | One Three Mixed Fungible (430253764) | 16/03/2021 | Home Modifications - Repair | Specialist Disability Accommodation (SDA) | 06_431_0131_2_2 | Quote is accepted |
| 5005215 | One Three Mixed Fungible (430253764) | 16/03/2021 | Assistive - New | Standing Frame - Child Under 5 | 05_053603010_0103_1_2 | Quote is accepted |
| 5005212 | OneTwo Three Self (430253754) | 16/03/2021 | Home Modifications - Repair | Specialist Disability Accommodation (SDA) | 06_431_0131_2_2 | Quote is accepted |

4. To view details for a particular quote, select the quote number under the **Quote ID** column. The **Quotation Details** screen displays. It allows you to enter your quotation response and upload any documents directly to the quote request.

5. Select the **View quotations** button to return to the list of quotations.

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.

Respond to a quote

- To respond to a quotation request, complete the fields in the **Quotation response** tab:
 - Supply details:** Enter all relevant information about the supply of the item or service.
 - Specifications:** Record the conditions of the quote.

- **Inclusions:** Enter all items that are included in the quote.
- **Specific exclusions:** Record any items that are excluded in the quote.
- **Price per unit:** Enter the total price of the quote per unit (excluding GST).
- **Quantity:** Specifies the item quantity.
- **GST per unit:** Record the GST amount.
- **Terms of quote:** Select the number of days that the quote is valid for - either 30 days or 60 days.

Quotation response

Associated documents

Quotation response ?

Supply details: *

Specifications: *

Inclusions: *

Specific exclusions: *

Price per unit: *

\$

Quantity:

2.00

GST per unit: *

\$

Grand total:

\$0.00

Terms of quote: *

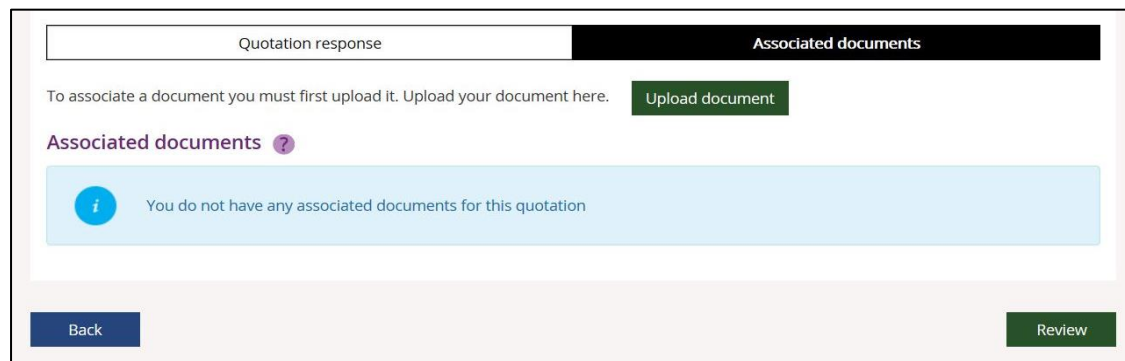
☐ 30 Days ☒ 60 Days

View quotations

Save

Next

2. Once you have entered all the information in the **Quotation response** tab, select the **Associated documents** tab to upload any documents relevant to your response.



Quotation response | **Associated documents**

To associate a document you must first upload it. Upload your document here. [Upload document](#)

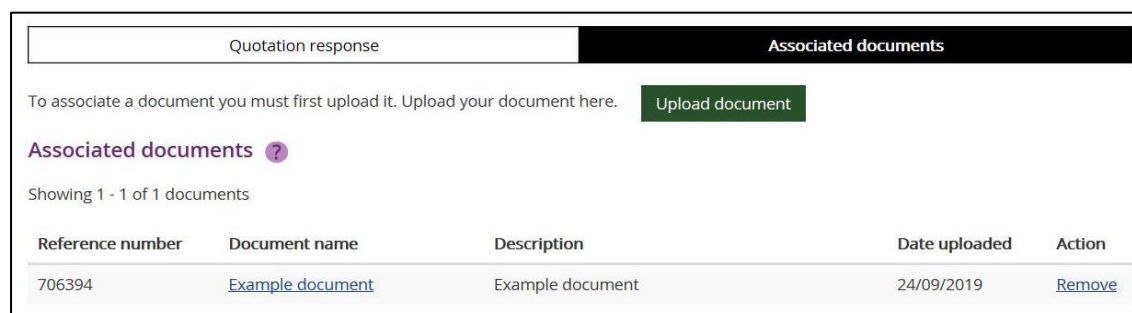
Associated documents ?

i You do not have any associated documents for this quotation

[Back](#) [Review](#)

The **Associated documents** tab displays. It lists any documents you have previously associated with your response to this quotation. If you have not previously uploaded any documents, the message will display 'You do not have any associated documents for this quotation'.

If you have previously uploaded a document, you will see it listed.



Quotation response | **Associated documents**

To associate a document you must first upload it. Upload your document here. [Upload document](#)

Associated documents ?

Showing 1 - 1 of 1 documents

| Reference number | Document name | Description | Date uploaded | Action |
|------------------|----------------------------------|------------------|---------------|------------------------|
| 706394 | Example document | Example document | 24/09/2019 | Remove |

Select the **Document name** if you want to download and view the document. You will be taken through a set of document download instructions.

Select **Remove** under **Actions** if you want to remove the document from your list of documents. You will be shown a message asking you to confirm your intention to remove the document from your list — either **Yes** or **No**.



You are about to remove this document from this quotation. Are you sure?

[NO](#) [YES](#)

3. To upload a document, select the **Upload document** button. A **Document Upload** window displays.

A list of **Available documents** is shown at the bottom of the window. These are documents that have previously been linked to this quote.

| Available Documents ? | | | |
|------------------------------------|------------------|---------------------|---------------|
| Showing 1-1 of 1 files | | | |
| Reference number | Document name | Description | Date uploaded |
| 707487 | Example document | Example description | 26/09/2019 |

Note: Uploaded documents are labelled **Available documents** when you are viewing the **Document upload** form. The same documents are labelled **Associated documents** when you view them on other Quotations screens.

4. Provide a **Document name** and **Description**.

Note: Use a meaningful short title for the document name, and a description that will help you distinguish this document from other documents in the list.

Document Upload
 Upload any supporting documents below

Required fields are marked with an asterisk (*)

Upload Document ?

Category: *

Quotation artefact

Quotation ID: *

5002972

Document name: *

eg. Example Document

Description:

eg. Example Description

Choose file: *

Choose File.(Max size 47MB)

Browse

Reset

Upload

5. Select **Browse** to locate the file you want to upload. The maximum file size you can upload is 47MB. Then select the **Upload** button.

Note: Any documents that you upload will also be visible to NDIA and participants.

A success message displays at the top of the page.

✔ You have successfully uploaded your document.

[Home](#) / [Document Upload](#)

Document Upload
 Upload any supporting documents below

Required fields are marked with an asterisk (*)

Upload Document ?

Category: * Quotation artefact

Quotation ID: * 5002972

Document name: *

Description:

Choose file: *

Available Documents ?

Showing 1-1 of 1 files

| Reference number | Document name | Description | Date uploaded |
|------------------|------------------|---------------------|---------------|
| 707487 | Example document | Example description | 26/09/2019 |

You will see that your file has been added to the **Available documents** list shown below the message.

6. Select the **Back to quotation details** button to return to your response window.

Your quotations details screen displays.

Home / Quotations / Quotation Details

Quotation Details

View and respond to quotation request

Required fields are marked with an asterisk (*)

Quotation request ?

| | | | |
|--------------------------|----------------------------|-------------------|--|
| Quote ID: | 5002977 | Reply by date: | 22/05/2019 |
| Status: | Awaiting provider response | Item: | 01_040_0115_1_1 |
| Participant NDIS number: | 430219240 | Item description: | Supported Independent Living - For 3 - L |
| Participant name: | Deb Quoteman6 | Quantity: | 2.00 |
| Date requested: | 24/04/2019 | Quote type: | Assistive - New |

Quotation response

Associated documents

To associate a document you must first upload it. Upload your document here. [Upload document](#)

Associated documents ?

Showing 1 - 1 of 1 documents

| Reference number | Document name | Description | Date uploaded | Action |
|------------------|----------------------------------|------------------|---------------|------------------------|
| 706394 | Example document | Example document | 24/09/2019 | Remove |

[Back](#)
[Review](#)

7. Select the **Review** button to review the details of your response before you submit them to NDIA.
8. Once you are satisfied that you have provided all necessary information and uploaded and/or removed relevant documents, select the **Submit** button.

Home / Quotations / Quotation Details / Review

Review quotation details

View and respond to quotation request

Quotation request ?

| | | | |
|--------------------------|----------------------------|-------------------|--|
| Quote ID: | 5002977 | Reply by date: | 22/05/2019 |
| Status: | Awaiting provider response | Item: | 01_040_0115_1_1 |
| Participant NDIS number: | 430219240 | Item description: | Supported Independent Living - For 3 - L |
| Participant name: | Deb Quoteman6 | Quantity: | 2.00 |
| Date requested: | 24/04/2019 | Quote type: | Assistive - New |

Quotation amount summary ?

| | |
|-----------------|---------|
| Price per unit: | \$10.00 |
| Quantity: | 2.00 |
| GST per unit: | \$1.00 |
| Grand total: | \$22.00 |
| Terms of quote: | 30 Days |

Quotation response ?

| | |
|----------------------|--------------|
| Supply details: | Main item |
| Specifications: | Many details |
| Inclusions: | Nil |
| Specific exclusions: | Nil |

Associated documents ?

Showing 1 - 1 of 1 documents

| Reference number | Document name | Description | Date uploaded |
|------------------|----------------------------------|------------------|---------------|
| 706394 | Example document | Example document | 24/09/2019 |

Back

Submit

A message displays asking you to confirm your submission of the quotation - either **Yes** or **No**.

You are about to submit this quotation. Are you sure?

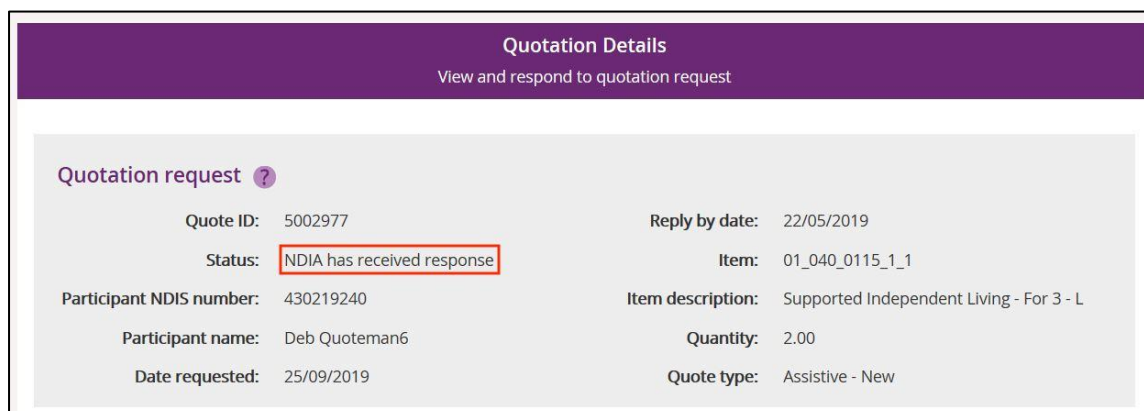
NO

YES

A success message displays at the top of your quotation details window.



The status of the quote changes for the quotation details to **NDIA has received response**.



If the NDIA approves your quote, the status of the quote changes to **Quote is accepted**.

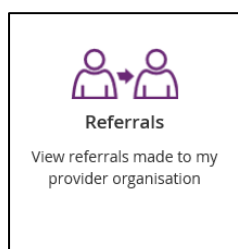
You will receive a message in your **Inbox** if the quote has been rejected by the NDIA.

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



The list of referrals opens.

2. Select **Home** to go back to the **myplace** home page.

| <div> Home Referrals </div> | | | |
|--|---------------------|----------------------|------------|
| 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 |

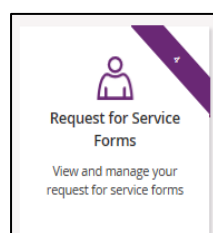
Requests for Service

This section allows you to:

- view Support Coordination Requests for Service sent to your provider organisation by the Agency
- access and review Support Coordination Requests for Service sent to your provider organisation by the Agency
- accept or reject Support Coordination Requests for Service sent to your provider organisation by the Agency.
- update your notification preferences for emails sent to you for Requests for Service.

View Support Coordination Requests for Service

1. Select the **Request for Service Forms** tile on the **myplace** home page.



2. The full list of **Request for Service Forms** displays. It shows the complete list of requests for service issued to your organisation.
3. You can search for specific requests for service by participant name or NDIS number.

Home / Request for Service Forms

Request for Service Forms

Below is a listing of the request for service forms for this organisation

Request for service forms - Help ?

Find a Participant ▼ Refine Search

Reset Search

Search Results

Showing 1 - 10 of 58 requests Sort By Request ID ▼

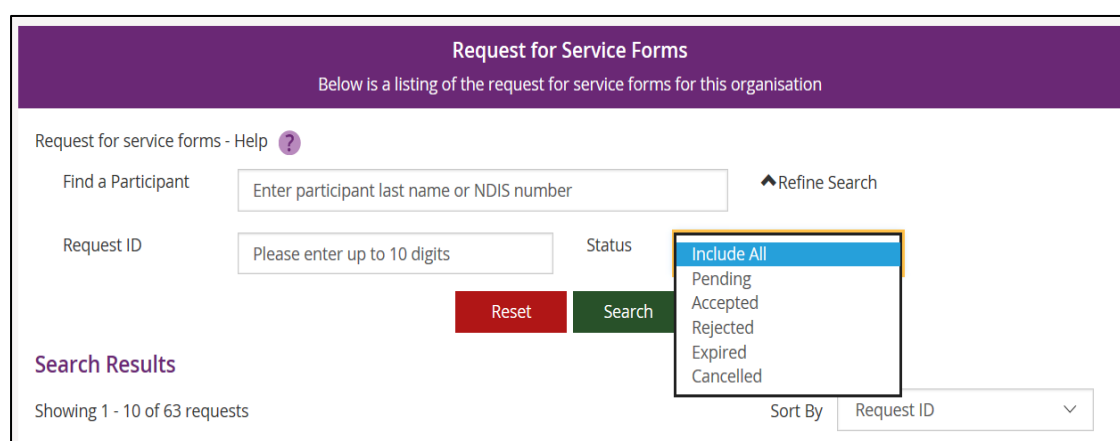
| Request ID | Participant Name | Plan End Date | Date Requested | Due Date | Status |
|------------------------|------------------|---------------|----------------|------------|-----------|
| 659805 | Caitlyn De Atta | 25/06/2020 | 29/07/2019 | 02/08/2019 | Accepted |
| 659680 | Haileah Alcano | 10/07/2020 | 29/07/2019 | 02/08/2019 | Cancelled |
| 656578 | ATHM Adult30 | 13/03/2020 | 24/07/2019 | 30/07/2019 | Rejected |
| 656573 | ATHM Adult26 | 15/07/2020 | 24/07/2019 | 30/07/2019 | Expired |
| 656561 | ATHM Adult56 | 20/02/2020 | 24/07/2019 | 30/07/2019 | Accepted |
| 656548 | ATHM Adult55 | 07/02/2020 | 24/07/2019 | 30/07/2019 | Rejected |
| 656539 | Adult Letters2 | 18/07/2020 | 24/07/2019 | 30/07/2019 | Cancelled |
| 656405 | Adult Letters2 | 18/07/2020 | 24/07/2019 | 30/07/2019 | Cancelled |
| 656325 | Adult Letters1 | 18/07/2020 | 24/07/2019 | 30/07/2019 | Expired |
| 656296 | Adult Letters1 | 18/07/2020 | 24/07/2019 | 30/07/2019 | Rejected |

[First](#)
[Previous](#)
Page 1 of 6
[Next](#)
[Last](#)

[Back](#)

4. Select an option from the **Refine Search** drop-down to sort the list by the column headers:
 - **Request ID:** Individual Request ID for each request.
 - **Participant name:** NDIS participant name.
 - **Plan End Date:** Participant Plan End Date.
 - **Date Requested:** The date the request for service was referred to your provider organisation.
 - **Due Date:** The Due Date by which you need to respond to a Request for Service referral request.
 - **Status:** Displays the status of the support coordination request for services:

- Pending, awaiting your review and response (maximum of 4 days)
- Accepted, provider has accepted the request
- Rejected, provider has rejected the request
- Expired, request has not been action by provider before due date
- Cancelled, the request has been cancelled



5. You can also sort the results in the **Sort By** drop-down by **Request ID** and **Status**.

Access and review Support Coordination Requests for Service

1. To access and review a request for service, click on the specific **Request ID**. You can only access a request for service with a status of **Pending** or **Accepted**.

2. While the list will display all requests for service submitted to your provider organisation, you will not be able to access requests with a status of **Cancelled**, **Rejected** or **Expired**.

Select the underlined **Request ID**.

| | | | | | |
|---------------|----------|------------|------------|------------|---------|
| <u>643143</u> | Sam Self | 26/03/2020 | 11/07/2019 | 17/07/2019 | Pending |
|---------------|----------|------------|------------|------------|---------|

The **Request for Service - Manage New Request for Service** screen displays.

Request for Service Details

Manage new request for service

Request for service details - Help ?

Required fields are marked with an asterisk (*)

Participant Details

Request ID: 643143

Name: Sam Self

Age: 39

Plan end date: 26/03/2020

Preferred contact method: E-Mail

Phone: N/A

Email: shyam.manthena@ndis.gov.au

Address: 114 BENNETTS RD
COFFS HARBOUR NSW 2450

Interpreter required: No

myplace activation code: Not generated

Due date: 17/07/2019

Purpose of referral: hdfhdf

Request Details

| Request ID | Document Name | Attached On |
|------------|--|-------------|
| 643143 | Request for service form | 11/07/2019 |

Referral Decision

Action: *

Back

Submit

The screen shows the following information:

- **Participants Details:** the request ID, participant's name, participant's age, the NDIS plan end date, preferred contact method, phone number, email, address, if a participant requires an interpreter, the myplace activation code status, the due date to action the request, and why the Agency referred the support coordination request to your provider organisation.
- **Request Details:** the Request ID, document name, and date of attached. This section provide access to the individual request for service details.
- **Referral Decision:** This section allows you to respond to the Agency's request for support coordination.

To access the detail for an individual Request for Service, select the **Request for Services form** link under the **Document Name** column header.

Request for Service Form

View a participant's request for service form

Request for service form - Help ?

Request Details

| | | | |
|-----------------|-----------------|-----------------|------------|
| Request number: | 671671 | Date requested: | 15/08/2019 |
| Name: | PRETTY GOOD 003 | Due date: | 21/08/2019 |
| Age: | 30 | Status: | Pending |

Part A: Request for Service

Part 1 & 2

Part 3 & 4

Part 5

Part 6

Part 7

Part 8

Participant Details

Request for service number: 671671

Name: PRETTY GOOD 003

Age: 30

Preferred contact method: E-Mail

Phone: N/A

Email: GRAHAM.BARRS@NDIS.GOV.AU

Address: 15 TAY ST
WATSON ACT 2602

Interpreter required: No

myplace activation code: Not generated

Contact Details for Representative is Same as Above

View RFS List

Back

Next

The request for service form displays. It comprises eight 'parts' — these are described below. Select the part name you are interested in. You can also select the **Next** or **Back** buttons below the part details to move from one part to another.

Note: Select the **View RFS List** button to display the full list of support coordination requests for service issued to your provider organisation.

The eight parts are as follows:

Part 1&2 displays the participant's name, age, contact details and other information.

Part 3&4 displays the details of the request support coordination provider and the nature of the support coordination request.

Part 5 displays the referrals for assessment that are part of helping the participant to implement their plan.

Part 6 displays details for the participant such as disability information, living arrangements, relationships and supports.

Part 7 displays the participant's goals.

Part 8 displays the participant's funded supports included in the participant's plan.

Accept or reject Support Coordination Requests for Service

The **Referral Decision** can be either **Accept** or **Reject**.

1. To accept or reject a Request for Service Form, select the underlined **Request ID**.

| | | | | | |
|---------------|----------|------------|------------|------------|---------|
| <u>643143</u> | Sam Self | 26/03/2020 | 11/07/2019 | 17/07/2019 | Pending |
|---------------|----------|------------|------------|------------|---------|

2. To accept the referral request, select **Accept** from the Action drop-down box and select the **Submit** button.

Request for Service Details
Manage new request for service

Request for service details - Help ?
Required fields are marked with an asterisk (*)

Participant Details

Request ID: 643143
Name: Sam Self
Age: 39
Plan end date: 26/03/2020
Preferred contact method: E-Mail
Phone: N/A
Email: shyam.manthena@ndis.gov.au
Address: 114 BENNETTS RD
COFFS HARBOUR NSW 2450
Interpreter required: No
myplace activation code: Not generated
Due date: 17/07/2019
Purpose of referral: hdfhdf

Request Details

| Request ID | Document Name | Attached On |
|------------|--|-------------|
| 643143 | Request for service form | 11/07/2019 |

Referral Decision

Action: *

Please select...
Accept
Reject

Back
Submit

- To reject the referral request, select **Reject**, followed by one of the four **Reject Reasons** in the drop-down box, and then select the **Submit** button.

Request for Service Details
Manage new request for service

Request for service details - Help ?
Required fields are marked with an asterisk (*)

Participant Details

Request ID: 643143
Name: Sam Self
Age: 39
Plan end date: 26/03/2020
Preferred contact method: E-Mail
Phone: N/A
Email: shyam.manthena@ndis.gov.au
Address: 114 BENNETTS RD
COFFS HARBOUR NSW 2450
Interpreter required: No
myplace activation code: Not generated
Due date: 17/07/2019
Purpose of referral: hdfndf

Request Details

| Request ID | Document Name | Attached On |
|------------|--|-------------|
| 643143 | Request for service form | 11/07/2019 |

Referral Decision

Action: *

Reject Reason: *

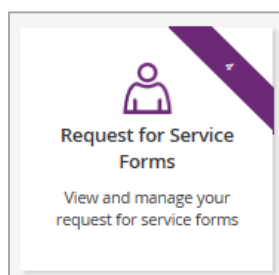
Please select...
No capacity to accept referral
No capability to accept referral
Insufficient participant budget to accept referral
Other

Back
Submit

Update Coordination Requests for Service Email Notification

When your organisation receives a new Request for Service you will be notified by email immediately. You can decide if your organisation will or will not receive immediate email notifications.

1. Select the **Request for Service Forms** tile on the **myplace** home page.



2. The full list of **Request for Service Forms** displays. It shows the complete list of requests for service issued to your organisation.
3. Select **Update Details**.

Home / Request for Service Forms

Request for Service Forms

Below is a listing of the request for service forms for this organisation

Request for service forms - Help ?

RFS email preferences can be updated in the Profile tile [Update details](#)

Find a Participant [Refine Search](#)

[Reset](#) [Search](#)

Search Results

Showing 1 - 10 of 10 requests Sort by Request ID ▼

| Request ID | Participant Name | Plan End Date | Date Requested | Due Date | Status |
|------------------------|------------------|---------------|----------------|------------|---------|
| 705556 | RFS03 Language03 | 16/09/2020 | 24/09/2019 | 30/09/2019 | Pending |
| 689860 | ATHM Child9 | 11/07/2020 | 04/09/2019 | 10/09/2019 | Pending |
| 686364 | ATHM Child9 | 11/07/2020 | 29/08/2019 | 04/09/2019 | Pending |
| 684996 | ATHM Child9 | 11/07/2020 | 28/08/2019 | 03/09/2019 | Pending |
| 672407 | ATHM Child9 | 11/07/2020 | 16/08/2019 | 22/08/2019 | Pending |
| 669503 | ATHM Child9 | 11/07/2020 | 12/08/2019 | 16/08/2019 | Pending |
| 655432 | ATHM Child9 | 11/07/2020 | 23/07/2019 | 29/07/2019 | Pending |
| 652619 | PRETTY GOOD 003 | 20/10/2019 | 19/07/2019 | 25/07/2019 | Pending |
| 651062 | ATHM Adult44 | 21/03/2021 | 17/07/2019 | 23/07/2019 | Pending |
| 645006 | ATHM Child9 | 11/07/2020 | 12/07/2019 | 18/07/2019 | Pending |

4. The **How Frequently Can NDIA Contact Me** page

Home / How Frequently Can NDIA Contact me?

How Frequently Can NDIA Contact Me?

Select how often you would like to receive correspondence from NDIA

How often do you want to be notified about changes to this organisation's:

Service bookings:

Quotations:

Do you wish to subscribe to emails about:

Request for Service: ☒ Yes ☐ No

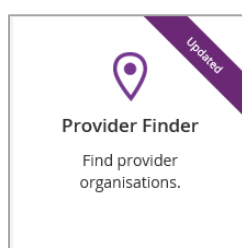
[Back to request for service](#) [Update](#)

5. Choose from Yes and No under **Do you wish to subscribe to emails about Request for Service** to update your Request for Service email preferences.
6. Click **Update**
7. The **Request for Service Forms** displays with a green banner message advising the contact details have been successfully updated.

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.

Home / Provider Finder

Provider Finder

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

I want to search by

| | | | |
|----------------------|---------------|--------------------|------------------|
| All Providers | Provider Name | Profession/Service | Support Category |
|----------------------|---------------|--------------------|------------------|

within of my organisation address or a different location

[Search](#)

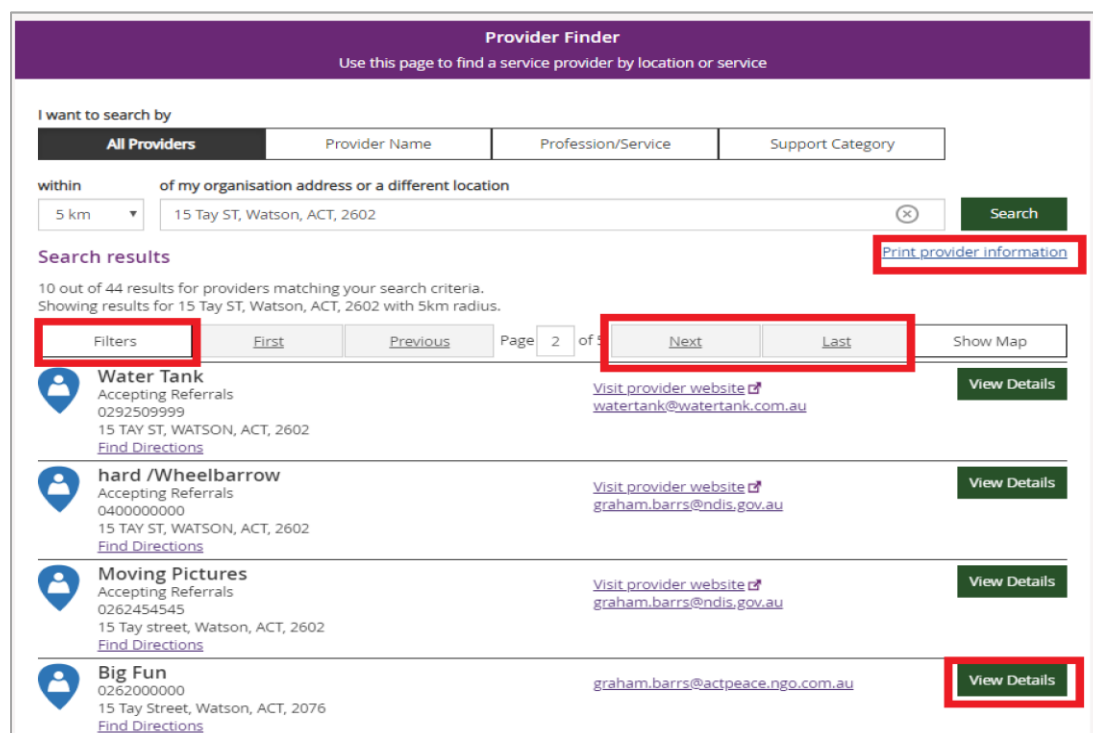
2. You can search by different criteria:

- **All Providers** – This option will display all providers within the selected distance of your address.
- **Provider Name** – This option will allow you to enter the name of the provider you are looking for within the selected distance of your address.
- **Profession/Service** – This option will allow you to select the profession/service you are looking for within the selected distance to your address. The profession/service is listed in a drop-down menu.
- **Support Category** – This option will allow you to select the support category you are looking for within the selected distance to your address. The support categories are listed in a drop-down menu.

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. Use the pagination functions to move through the results.



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

I want to search by

All Providers | Provider Name | Profession/Service | Support Category

within 5 km of my organisation address or a different location





15 Tay ST, Watson, ACT, 2602

Search

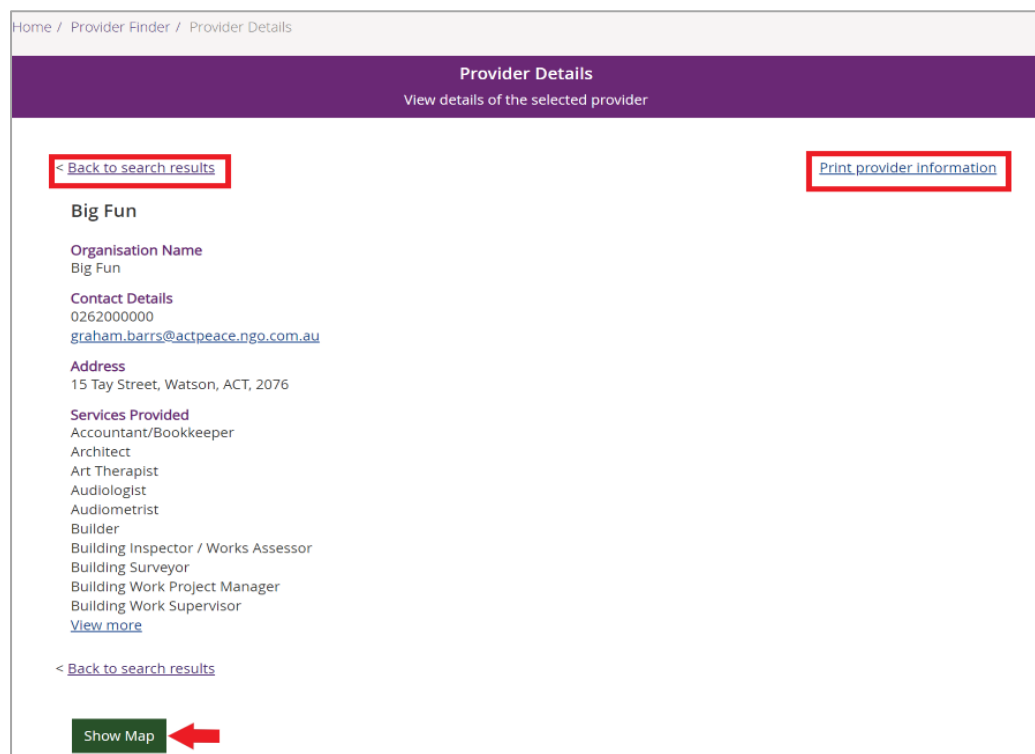
Search results [Print provider information](#)

10 out of 44 results for providers matching your search criteria.
Showing results for 15 Tay ST, Watson, ACT, 2602 with 5km radius.

[Filters](#) | [First](#) | [Previous](#) | Page 2 of 5 | [Next](#) | [Last](#) | [Show Map](#)

| | | | |
|---|--|--|------------------------------|
|  | Water Tank Accepting Referrals 0292509999 15 TAY ST, WATSON, ACT, 2602 Find Directions | Visit provider website watertank@watertank.com.au | View Details |
|  | hard/Wheelbarrow Accepting Referrals 0400000000 15 TAY ST, WATSON, ACT, 2602 Find Directions | Visit provider website graham.barrs@ndis.gov.au | View Details |
|  | Moving Pictures Accepting Referrals 0262454545 15 Tay street, Watson, ACT, 2602 Find Directions | Visit provider website graham.barrs@ndis.gov.au | View Details |
|  | Big Fun 0262000000 15 Tay Street, Watson, ACT, 2076 Find Directions | graham.barrs@actpeace.ngo.com.au | View Details |

4. 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.



Home / Provider Finder / Provider Details

Provider Details

View details of the selected provider

[< Back to search results](#) [Print provider information](#)

Big Fun


Organisation Name
Big Fun

Contact Details
0262000000
graham.barrs@actpeace.ngo.com.au

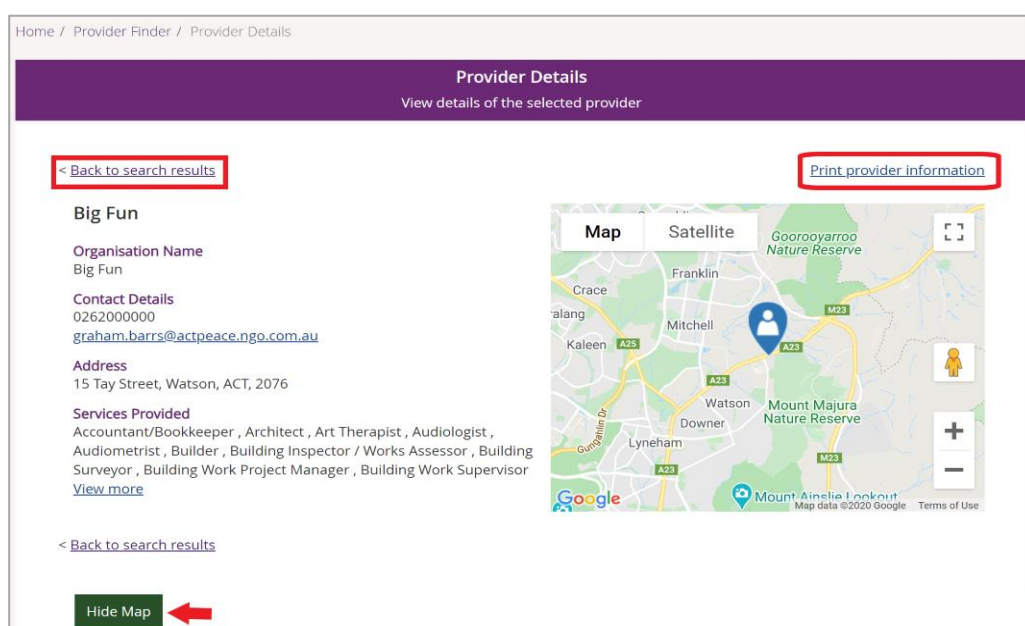
Address
15 Tay Street, Watson, ACT, 2076

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](#)

[Show Map](#) 

5. Select **Show Map** to view the location of the provider. You can print the search results by selecting **Print provider information**. 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](#) [Print provider information](#)

Big Fun


Organisation Name
Big Fun


Contact Details
0262000000
graham.barrs@actpeace.ngo.com.au

Address
15 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](#) 

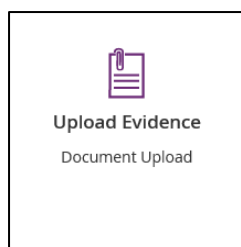


6. You can print the search results by selecting **Print provider information** or **Hide Map** to return to the Provider Details page. Select **Back to search results** to return to the search results.

Upload evidence

For some processes (e.g. Quotations,) you need to provide additional information to the Agency. **Upload Evidence** provides this capability. This area enables you to upload documents to the NDIA.

1. Select the **Upload Evidence** tile on the **myplace** home page.



The **Document Upload** page displays.

2. Type in the **Document Name** (a meaningful name for you) and **Description** (what it contains).
3. Select **Browse** to locate the document on your computer.
4. 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

| Reference number | Document name | Description | Added on |
|------------------|--------------------|--------------------|------------|
| 499826 | MyDocu | DOBClient | 12/09/2018 |
| 498509 | evidence required | this is evidence | 30/08/2018 |
| 498236 | evidence112 | 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.

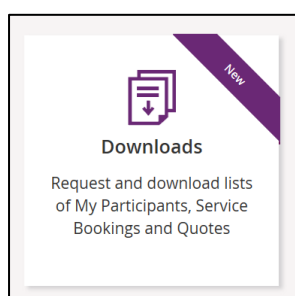
Tip: Use meaningful document names and description. For example, put the type of document (e.g. Home Modification Plan) in the Document Name, and the Participant's NDIS number in the Description.

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

Downloads

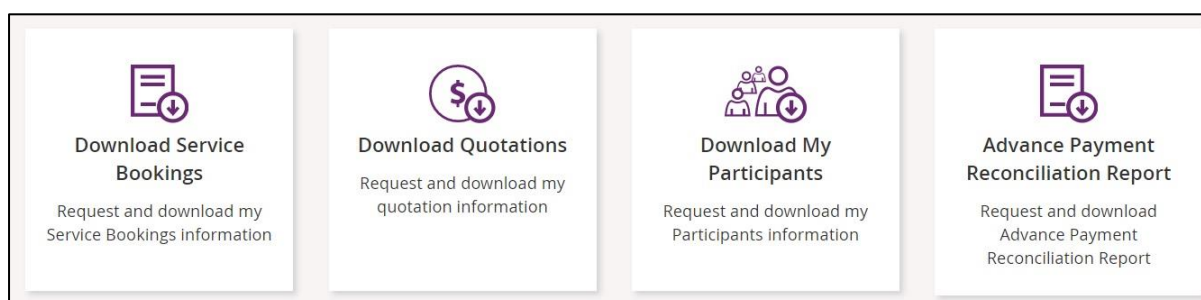
You can download in just one report information about all the service bookings you have with active participants as well as information about all the participants that you have service bookings with and who have given the NDIA consent to share their plan with you. You can also download a list of your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

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



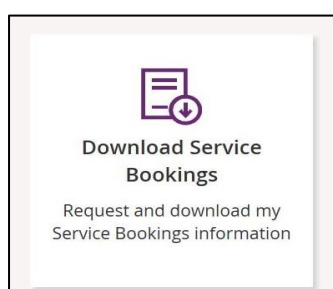
2. After you click the **Downloads** tile, you will see a new tile screen with these options:

- **Download Service Bookings**
- **Download Quotations**
- **Download My Participants**
- **Advance Payment Reconciliation Report.**



Download Service Bookings

This tile allows you to 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.

Note: The download report will be available for 90 days. The reports older than 90 days will be automatically deleted.

Note: If you are downloading reports to identify any service bookings that have expired or are about to expire, to determine if they have been extended by the [365-day plan auto-extension](#) feature, you should filter the report by plan end date in Excel.

Home / Downloads / Download Service Bookings

Download Service Bookings

Request and download my Service Bookings information

Download Service Bookings - Help ?

Service bookings can be downloaded for up to 90 days after a booking has been submitted. Downloads expire after 90 days. Service bookings can be viewed in the 'View Service Bookings' area at any time.

Request Download

List of Downloads

| Requested At | Start Date | End Date | Generated At | Action |
|------------------|------------|------------|------------------|----------|
| 14/04/2021 16:39 | 14/01/2021 | 14/04/2021 | 14/04/2021 16:45 | Download |
| 08/04/2021 08:56 | 08/01/2021 | 08/04/2021 | 08/04/2021 09:00 | Download |
| 16/02/2021 12:35 | 18/11/2020 | 16/02/2021 | 16/02/2021 12:45 | Download |
| 05/02/2021 10:23 | 07/11/2020 | 05/02/2021 | 05/02/2021 10:30 | Download |
| 17/08/2020 12:23 | 19/05/2020 | 17/08/2020 | 17/08/2020 12:37 | Download |
| 31/07/2020 14:43 | 02/05/2020 | 31/07/2020 | 31/07/2020 14:52 | Download |
| 06/07/2020 15:11 | 07/04/2020 | 06/07/2020 | 06/07/2020 15:22 | Download |
| 06/03/2020 09:21 | 07/12/2019 | 06/03/2020 | 06/03/2020 09:22 | Download |
| 04/03/2020 14:26 | 05/12/2019 | 04/03/2020 | 04/03/2020 14:37 | Download |
| 21/01/2020 10:54 | 23/10/2019 | 21/01/2020 | 21/01/2020 11:07 | Download |
| 25/09/2019 14:35 | 27/06/2019 | 25/09/2019 | 25/09/2019 14:37 | Download |

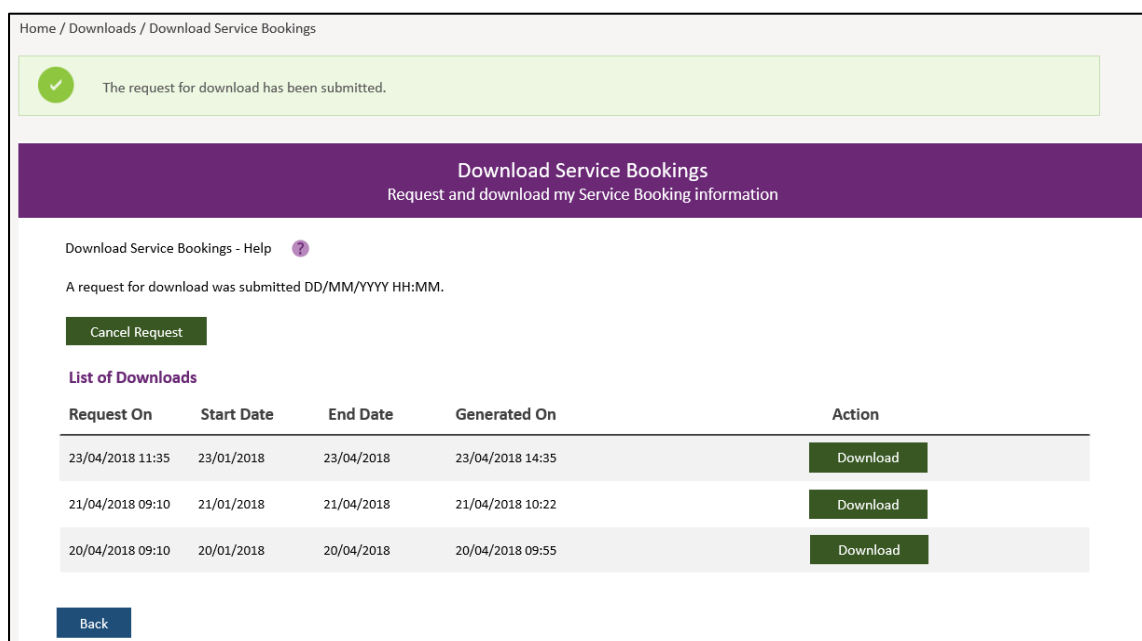
First
Previous
Page 1 of 7
Next
Last

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

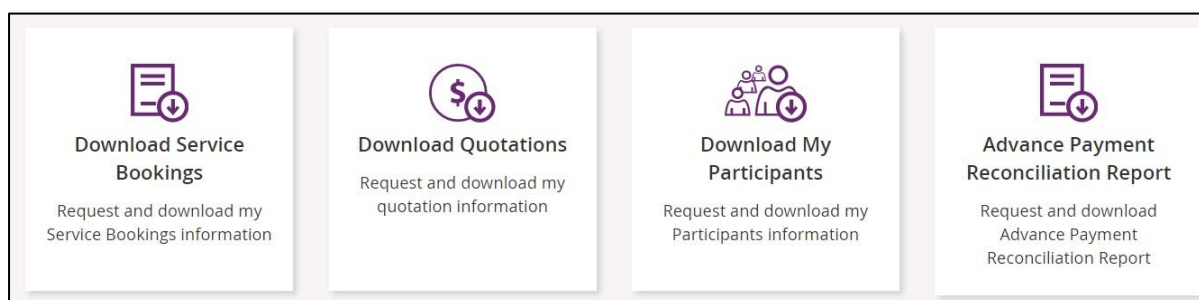
List of Downloads


| 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 | Download |
| 21/04/2018 09:10 | 21/01/2018 | 21/04/2018 | 21/04/2018 10:22 | Download |
| 20/04/2018 09:10 | 20/01/2018 | 20/04/2018 | 20/04/2018 09:55 | Download |

Back


3. 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.







Download Service Bookings
Request and download my Service Bookings information



Download Quotations
Request and download my quotation information



Download My Participants
Request and download my Participants information



Advance Payment Reconciliation Report
Request and download Advance Payment Reconciliation Report

4. 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.

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

Home / Downloads / Download Service Bookings

Download Service Bookings

Request and download my Service Bookings information

Download Service Bookings - Help ?

Service bookings can be downloaded for up to 90 days after a booking has been submitted. Downloads expire after 90 days. Service bookings can be viewed in the 'View Service Bookings' area at any time.

Request Download

List of Downloads

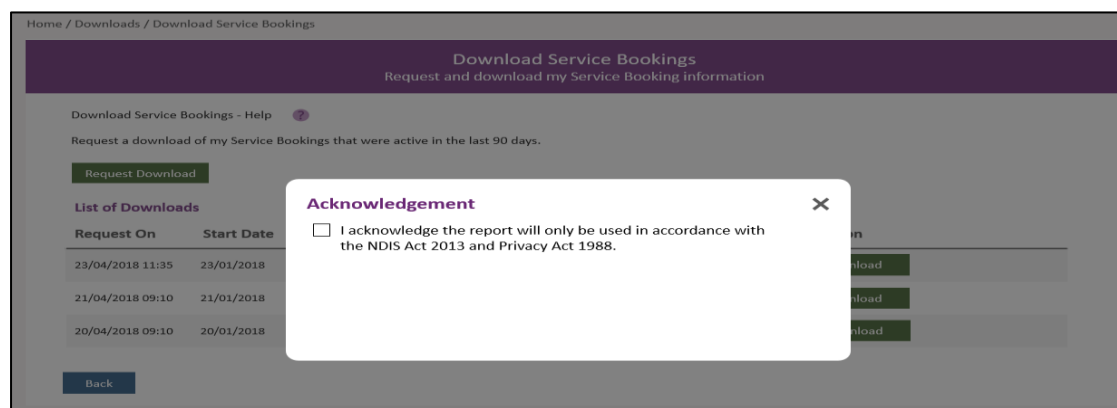
| Requested At | Start Date | End Date | Generated At | Action |
|------------------|------------|------------|------------------|----------|
| 14/04/2021 16:39 | 14/01/2021 | 14/04/2021 | 14/04/2021 16:45 | Download |
| 08/04/2021 08:56 | 08/01/2021 | 08/04/2021 | 08/04/2021 09:00 | Download |
| 16/02/2021 12:35 | 18/11/2020 | 16/02/2021 | 16/02/2021 12:45 | Download |
| 05/02/2021 10:23 | 07/11/2020 | 05/02/2021 | 05/02/2021 10:30 | Download |
| 17/08/2020 12:23 | 19/05/2020 | 17/08/2020 | 17/08/2020 12:37 | Download |
| 31/07/2020 14:43 | 02/05/2020 | 31/07/2020 | 31/07/2020 14:52 | Download |
| 06/07/2020 15:11 | 07/04/2020 | 06/07/2020 | 06/07/2020 15:22 | Download |
| 06/03/2020 09:21 | 07/12/2019 | 06/03/2020 | 06/03/2020 09:22 | Download |
| 04/03/2020 14:26 | 05/12/2019 | 04/03/2020 | 04/03/2020 14:37 | Download |
| 21/01/2020 10:54 | 23/10/2019 | 21/01/2020 | 21/01/2020 11:07 | Download |
| 25/09/2019 14:35 | 27/06/2019 | 25/09/2019 | 25/09/2019 14:37 | Download |

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

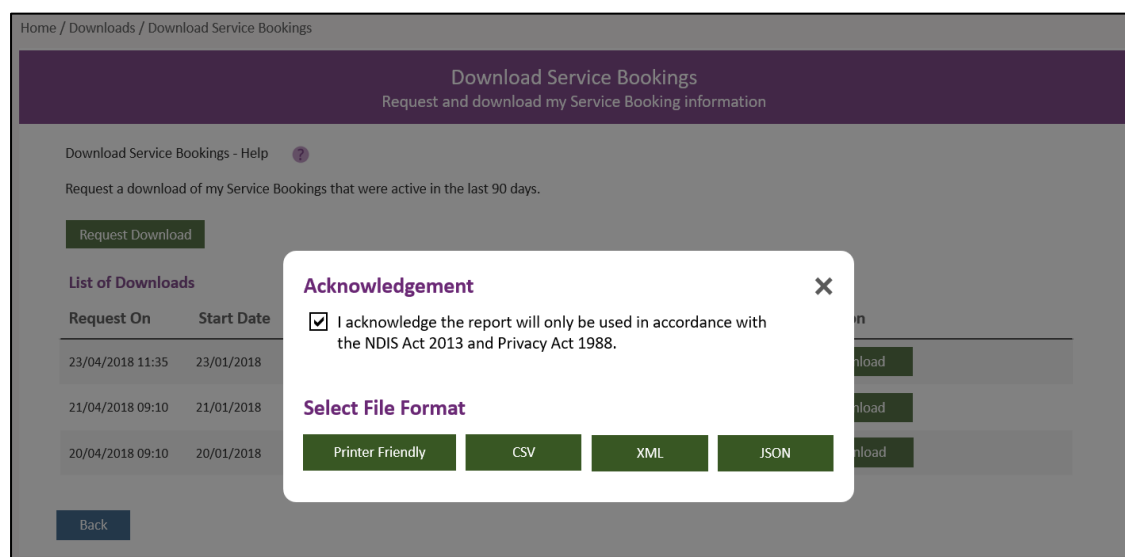
First Previous Page 1 of 7 Next Last

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.



After you check the **Acknowledgement** box, the popup window will expand to display a number of file format download options.

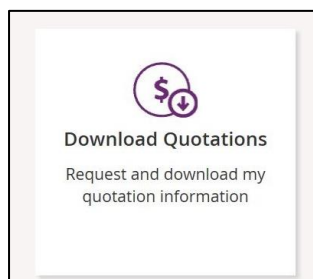


You have a choice of 4 format types depending on your business needs. They are:

- **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

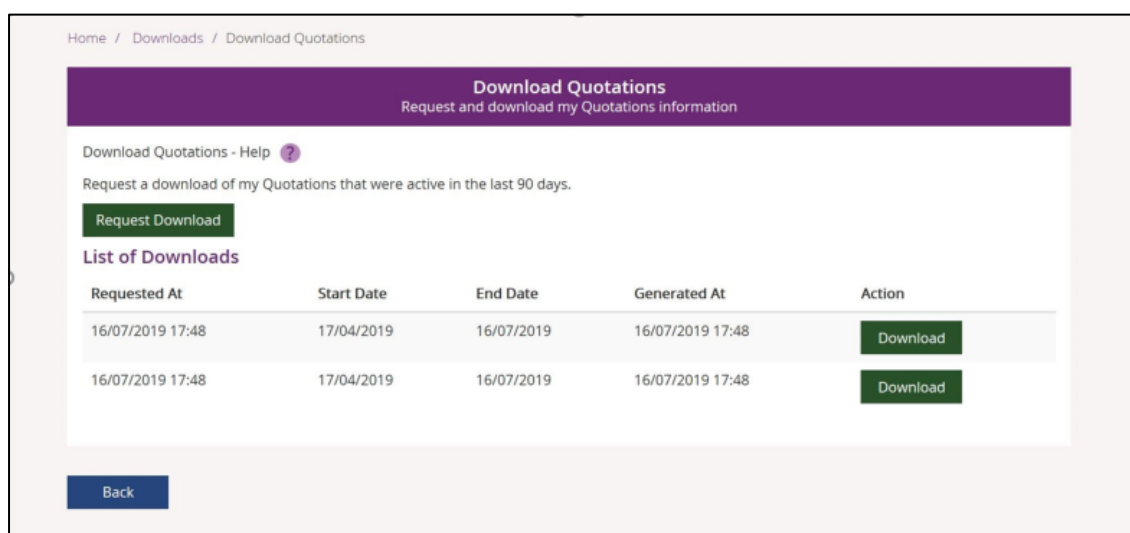
Download Quotations

This tile lets you download a list of all your quote requests.

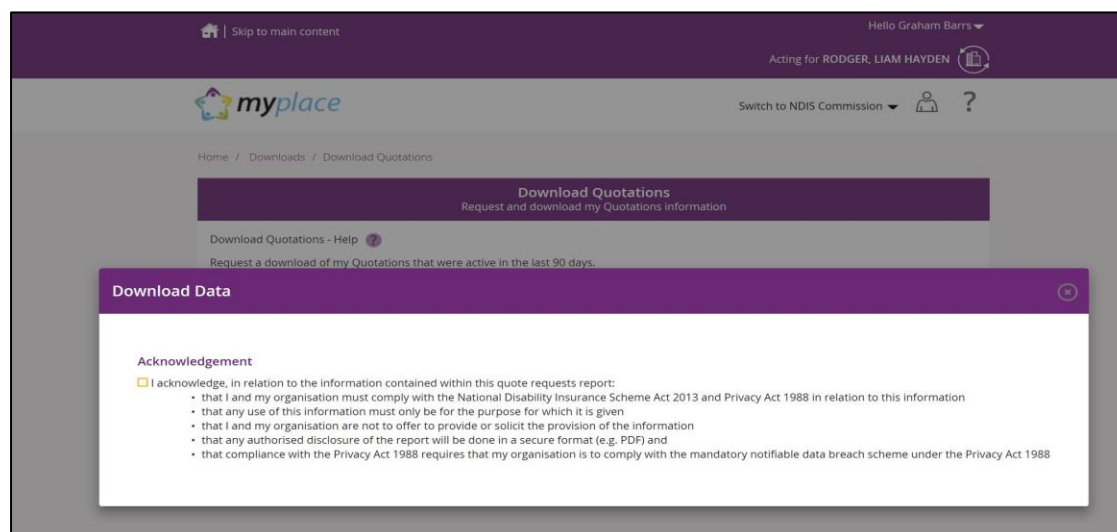


1. Select **Download Quotations** to request and download your quote requests.

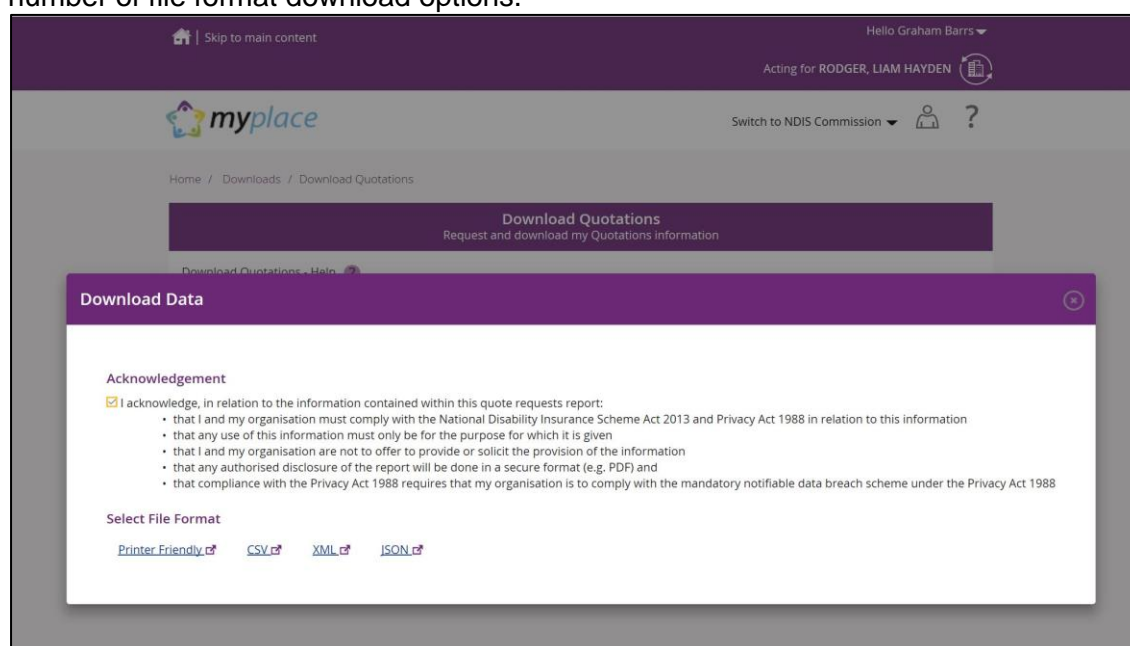
The **Download Quotations** screen displays a list of all quotes received by your organisation in the previous 90 days. If none were requested, no list will be displayed.



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.
3. When you select **Request 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.



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:

- **Printer 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 participant's 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.

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](#)

[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.

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 | Expires At | Action |
|-----------------|-----------------|--------------------------|
| 24/04/2018 1:35 | 25/04/2018 1:35 | Download |


[Back](#)

- Max 1 row available.
- Format selection available on clicking the download button.

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](#)

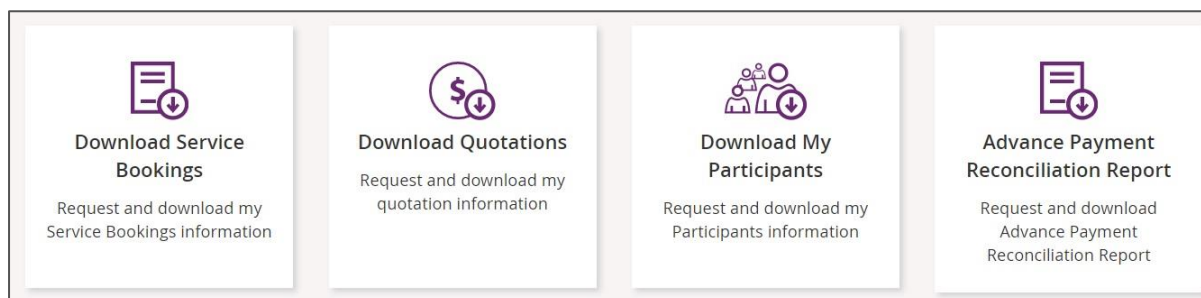
List of Downloads

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

[Back](#)

3. 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.

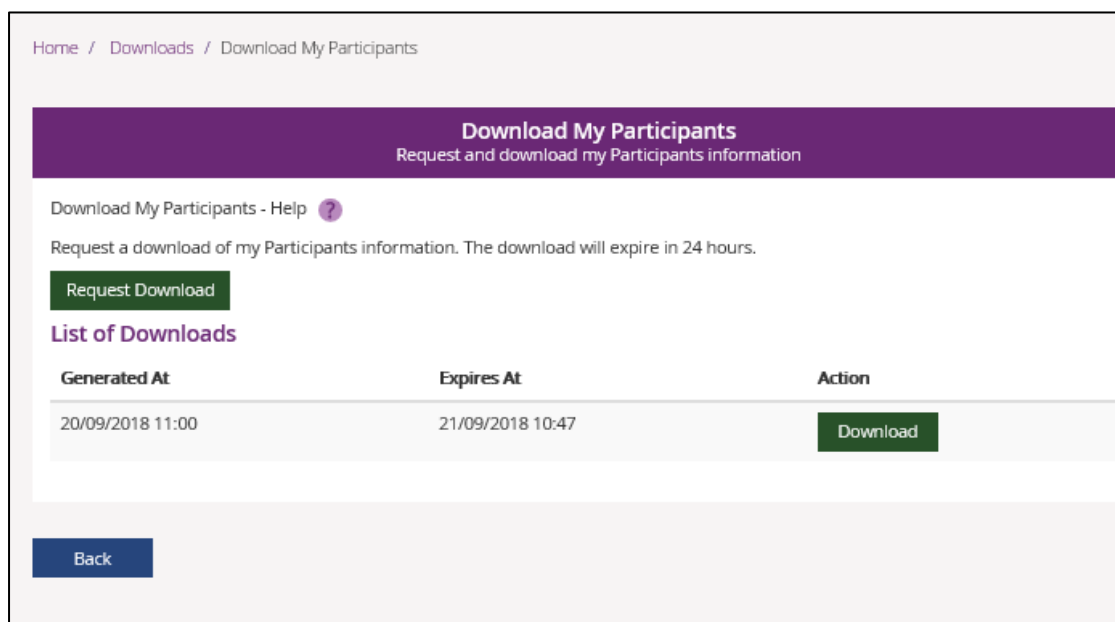
The **Downloads** page displays once more.



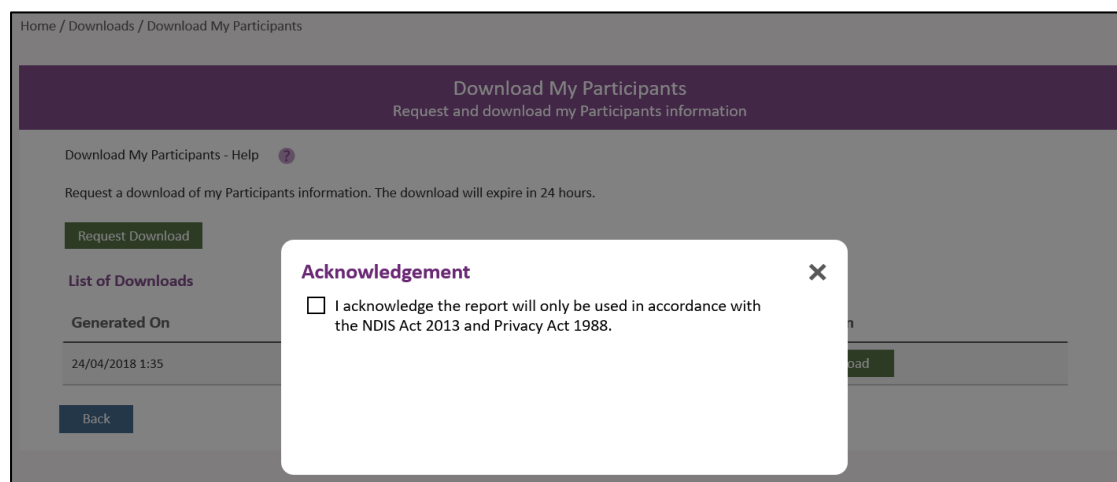
4. Select the **Download Service Bookings** tile to view the list of available reports. Your report will be listed first.

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.

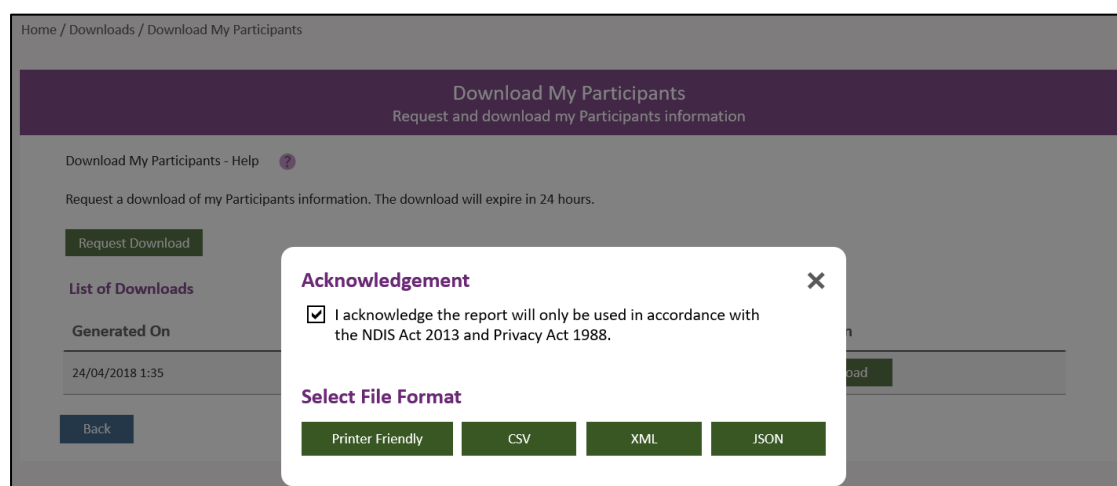
Select **Download** to download the report you requested.



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.



After you check the **Acknowledgement** box, the popup window will expand to display a number of file format download options.



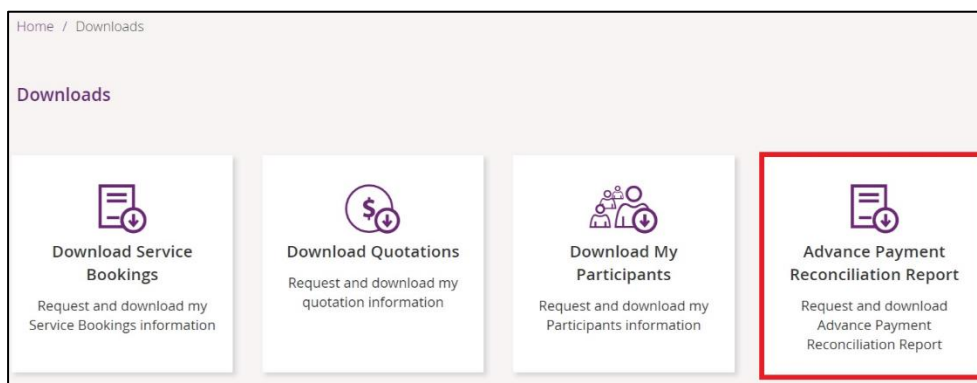
You have a choice of 4 format types depending on your business needs. They are:

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

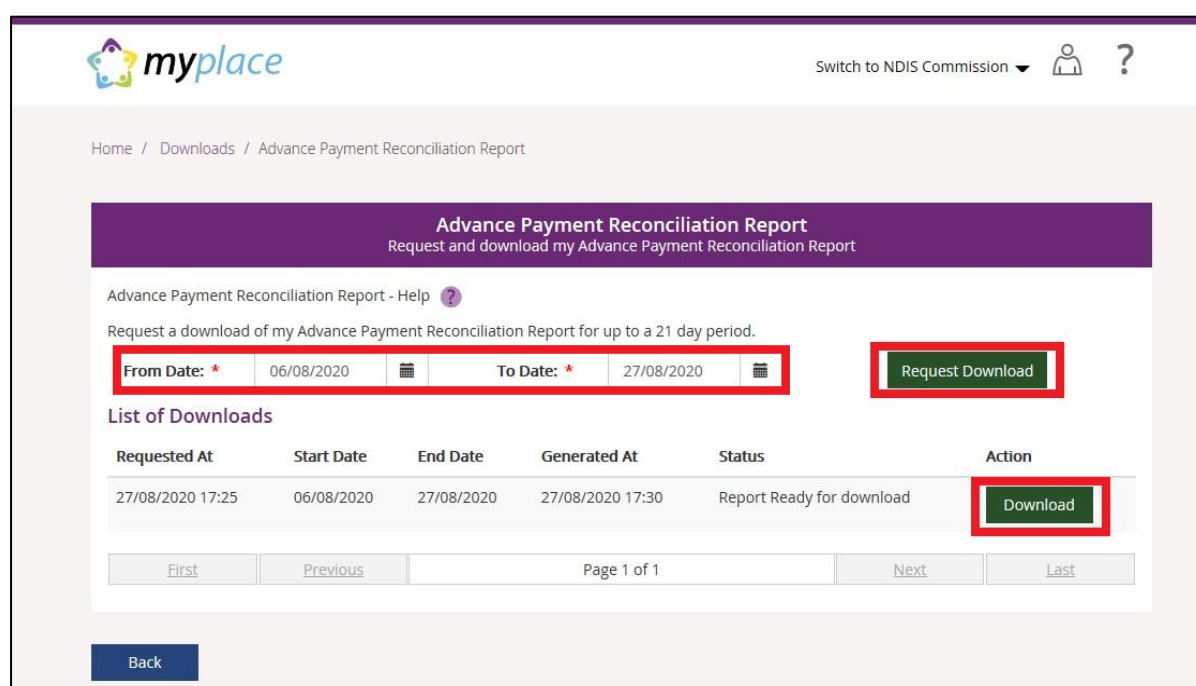
Advance payment reconciliation report

The **Advance Payment Reconciliation Report** tile lets you download the advance payment reconciliation report in CSV format.



1. Select **Advance Payment Reconciliation Report**.
2. On the **Advance Payment Reconciliation Report** page, complete the **From Date** and **To Date** fields to set the date range for the report.
Note: The **From** and **To** dates must be within a 21-day period.
3. Click **Request Download**. The system displays the request in the List of Downloads area.
4. Click **Download**.

The report may take up to 10 minutes to download.



myplace

Switch to NDIS Commission

Home / Downloads / Advance Payment Reconciliation Report

Advance Payment Reconciliation Report

Request and download my Advance Payment Reconciliation Report

Advance Payment Reconciliation Report - Help

Request a download of my Advance Payment Reconciliation Report for up to a 21 day period.

From Date: * 06/08/2020 To Date: * 27/08/2020

Request Download

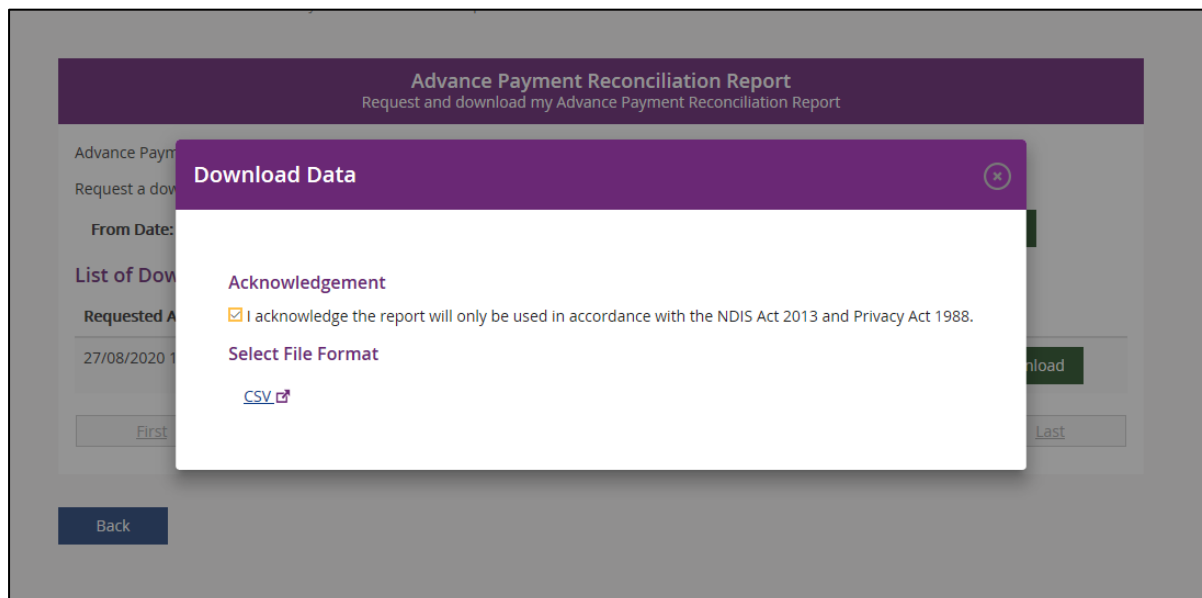
List of Downloads

| Requested At | Start Date | End Date | Generated At | Status | Action |
|------------------|------------|------------|------------------|---------------------------|----------|
| 27/08/2020 17:25 | 06/08/2020 | 27/08/2020 | 27/08/2020 17:30 | Report Ready for download | Download |

First Previous Page 1 of 1 Next Last

Back

5. Select the **Acknowledgement** checkbox. After you have acknowledged the message a link to a CSV file appears.



6. Click the **CSV** link to download the report.

| | | | | | | | | | | | | | | | |
|-----------------------|----------------------|-----------------|--------------|-----------------------|---------|------------|---------------|---------------|-----------------|---------------|------------------|----------------|----------------------|-----------|----------------|
| Advance Summary | | | | | | | | | | | | | | | |
| Advance Paid | \$73,000.00 | | | | | | | | | | | | | | |
| Advance Remaining | \$61,577.89 | | | | | | | | | | | | | | |
| Advance Recovered | \$11,422.11 | | | | | | | | | | | | | | |
| Transaction Details | | | | | | | | | | | | | | | |
| From : 06.08.2020 | | To : 27.08.2020 | | | | | | | | | | | | | |
| Total Payment Request | \$11,422.11 | | | | | | | | | | | | | | |
| Total Cancellation | \$0.00 | | | | | | | | | | | | | | |
| Advance Recovered | \$11,422.11 | | | | | | | | | | | | | | |
| Total Amount Payable | \$0.00 | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | |
| Transaction Type | PayReq Submission Dt | Request Number | ProvClaimRef | ItemID | ItemQty | UnitPrice | AmountClaimed | AmountPayable | AmountRecovered | ParticipantBP | SupportStartDate | SupportEndDate | ServiceBookingNumber | BulkClmId | Provider State |
| Payment Request | 27.08.2020 | 10304898 | 12343 | 03_091_0121_1_1 | 5 | \$200.00 | \$1,000.00 | \$563.65 | \$563.65 | 430213257 | 27.08.2020 | 27.08.2020 | 55009440 | SA | |
| Payment Request | 27.08.2020 | 10304899 | 123456 | 03_092403054_0103_1_9 | 10 | \$300.00 | \$3,000.00 | \$3,000.00 | \$3,000.00 | 430213257 | 27.08.2020 | 27.08.2020 | 55009440 | SA | |
| Payment Request | 27.08.2020 | 10304900 | 12255 | 01_011_0107_1_1 | 3 | \$1,000.00 | \$3,000.00 | \$228.06 | \$228.06 | 430213257 | 27.08.2020 | 27.08.2020 | 55009440 | SA | |
| Payment Request | 27.08.2020 | 10304901 | ewwa | 15_056_0128_1_3 | 20 | \$125.00 | \$2,500.00 | \$2,500.00 | \$2,500.00 | 430213257 | 27.08.2020 | 27.08.2020 | 55009440 | SA | |
| Payment Request | 27.08.2020 | 10304902 | asfg | 01_019_0120_1_1 | 20 | \$75.00 | \$1,500.00 | \$1,380.40 | \$1,380.40 | 430213257 | 27.08.2020 | 27.08.2020 | 55009440 | SA | |
| Payment Request | 27.08.2020 | 10304903 | 2454 | 06_183003384_0111_2_2 | 3 | \$1,250.00 | \$3,750.00 | \$3,750.00 | \$3,750.00 | 430213257 | 27.08.2020 | 27.08.2020 | 55009440 | SA | |

The Advance Payment Reconciliation Report summarises the total amount of the advance payment, the amount still owing, and the amount recovered.

It also displays the payment requests you made over the period of the report, alongside the amount the Agency deducted as advance payment recovery instalments.

Note: When viewing payment details, payment requests will have “offset” status against them for reconciliation purposes.