NDIS myplace provider portal

Step-by-step guide

Part 4. Administering your services

March 2024

Provider portal step-by-step guide

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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 March 2024:

- Text has been updated for Assistive Technology and Home Modification providers (page 53)

How to contact NDIS

Contact the NDIS by		
NDIS Webchat You can live chat with us about: • myplace provider portal • Service bookings • Payment requests • Quotes • Referrals • Request for service • Searching for a register provider	**Phone** 1800 800 110 You can call us about: • myplace provider portal • Service bookings • Payment requests • Quotes • Referrals • Request for service • Submitting a general enquiry, feedback, compliment or a complaint	**provider portal** You can use the provider portal to: • Submit a payment enquiry • Submit a general enquiry, feedback, compliment or a complaint • Search for a provider • Upload documents
Email us enquiries@ndis.gov.au You can email us about: • Submitting a general enquiry, feedback, compliment or a complaint • Emailing a document, form report or letter	**Contact and Feedback form** NDIS Online Form You can use the Online form to: • Submit a general enquiry, feedback, compliment or a complaint • Request a call back	**Mailing address** National Disability Insurance Agency GPO Box 700 Canberra ACT 2601 You can mail us: • Compliment, complaint or provide feedback, • Document, form, report or letter

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.
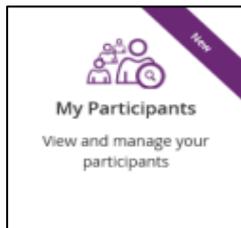
2. A list of active participants sorted by first name is displayed. From here you can select the links to view their plan, view or create service bookings and payment requests.

Note: PACE participant plans cannot be viewed using myplace provider portal. Please use the my NDIS provider portal to view new participants plans.

3. To search for a participant, type their name or NDIS number in the **Find a Participant** field and select **Search**.

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**.
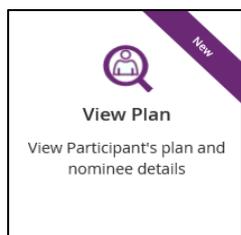

A **Participant Search** screen displays.

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.


> No search results have been found. Check that participant's first name and last name are correct and that the NDIS number you provided is correctly formatted. It should be 9 digits long, with no spaces, and start with '43'. Alternatively, this could be a PACE approved participant. Please use the my NDIS provider portal to view the PACE plan.

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.

Note: For a PACE approved participant you will need to use my NDIS provider portal to view the PACE plan.

7. You can hover over the '**?**' Help icon to obtain help on fields.
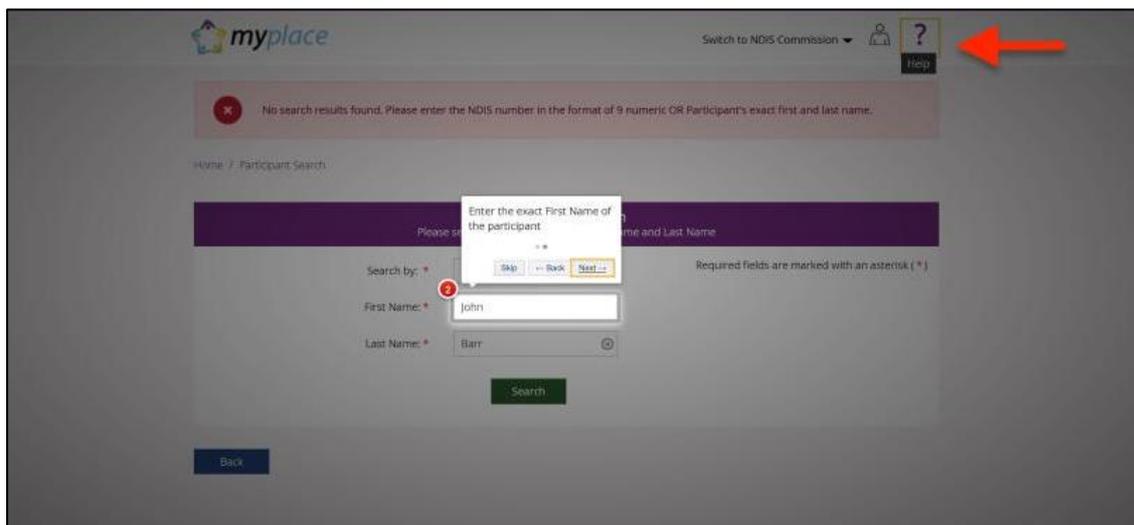
After searching for a participant, you will see the **View Participant Plan** page. Select the required participant to open their plan details.
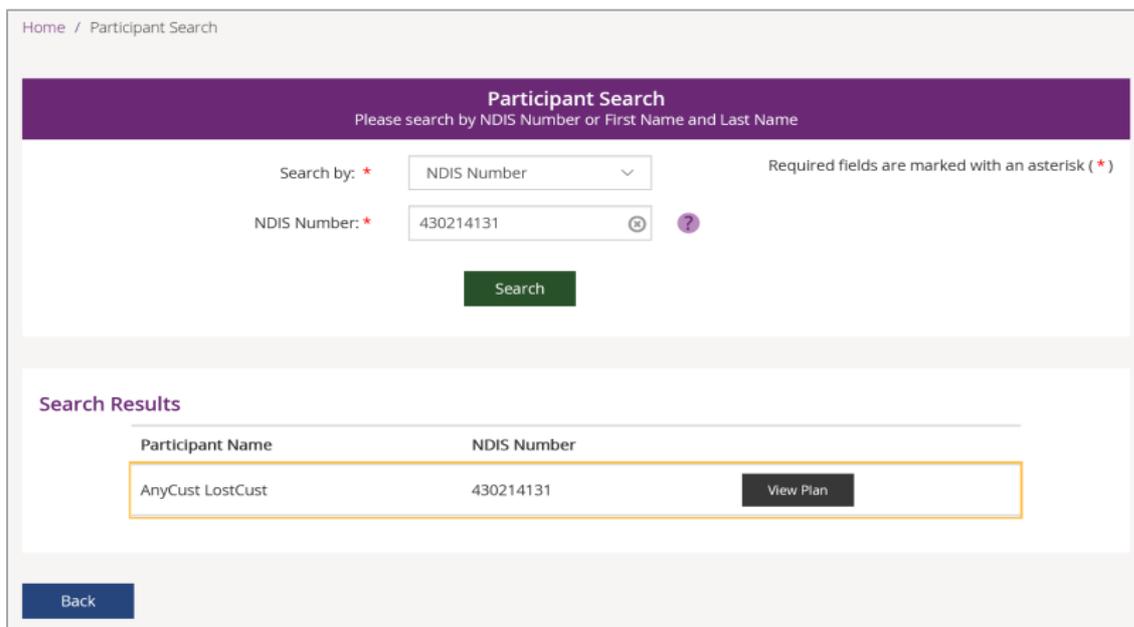
8. The **View Participant's Plan** page shows the participant's details (name, gender, NDIS number, date of birth and interpreter need) as well as three open/close sections displaying the participant's:

- **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

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- **Participant's Nominee Details** – showing the nominee's name and relationship details, where a nominee exists.

The **View Participant's Historical Plan** page opens.

9. Select **Open Section** to view details of past plans.

 Note: This will only be available if the participant has previous plans.

Important Note: Help text is available throughout the screens. Simply hover your cursor over the field you need more information about.

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.

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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

(includes allocated items)

Allocated Items(0)
None

Improved daily living

Funds Spent:	$20.00
Funds Remaining:	$1,091.00
Approved Funds:	$1,111.00

(includes allocated items)

Allocated Items(0)
None

Finding and keeping a job

Funds Spent:	$0.00
Funds Remaining:	$2,000.00
Approved Funds:	$2,000.00

(includes allocated items)

Allocated Items(0)
None

Improved health and wellbeing

Funds Spent:	$0.00
Funds Remaining:	$2,000.00
Approved Funds:	$2,000.00

(includes allocated items)

Allocated Items(0)
None

Improved living arrangements

Funds Spent:	$0.00
Funds Remaining:	$2,000.00
Approved Funds:	$2,000.00

(includes allocated items)

Allocated Items(0)
None

Improved learning

Funds Spent:	$0.00
Funds Remaining:	$20,000.00
Approved Funds:	$20,000.00

(includes allocated items)

Allocated Items(0)
None

Improved relationships

Funds Spent:	$0.00
Funds Remaining:	$200.00
Approved Funds:	$200.00

(includes allocated items)

Allocated Items(0)
None

Increased social and community participation

Funds Spent:	$0.00
Funds Remaining:	$2,500.00
Approved Funds:	$2,500.00

(includes allocated items)

Allocated Items(0)
None

Support coordination

Funds Spent:	$21.00
Funds Remaining:	$161.74
Approved Funds:	$182.74

(includes allocated items)

Allocated Items(0)

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**.

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.
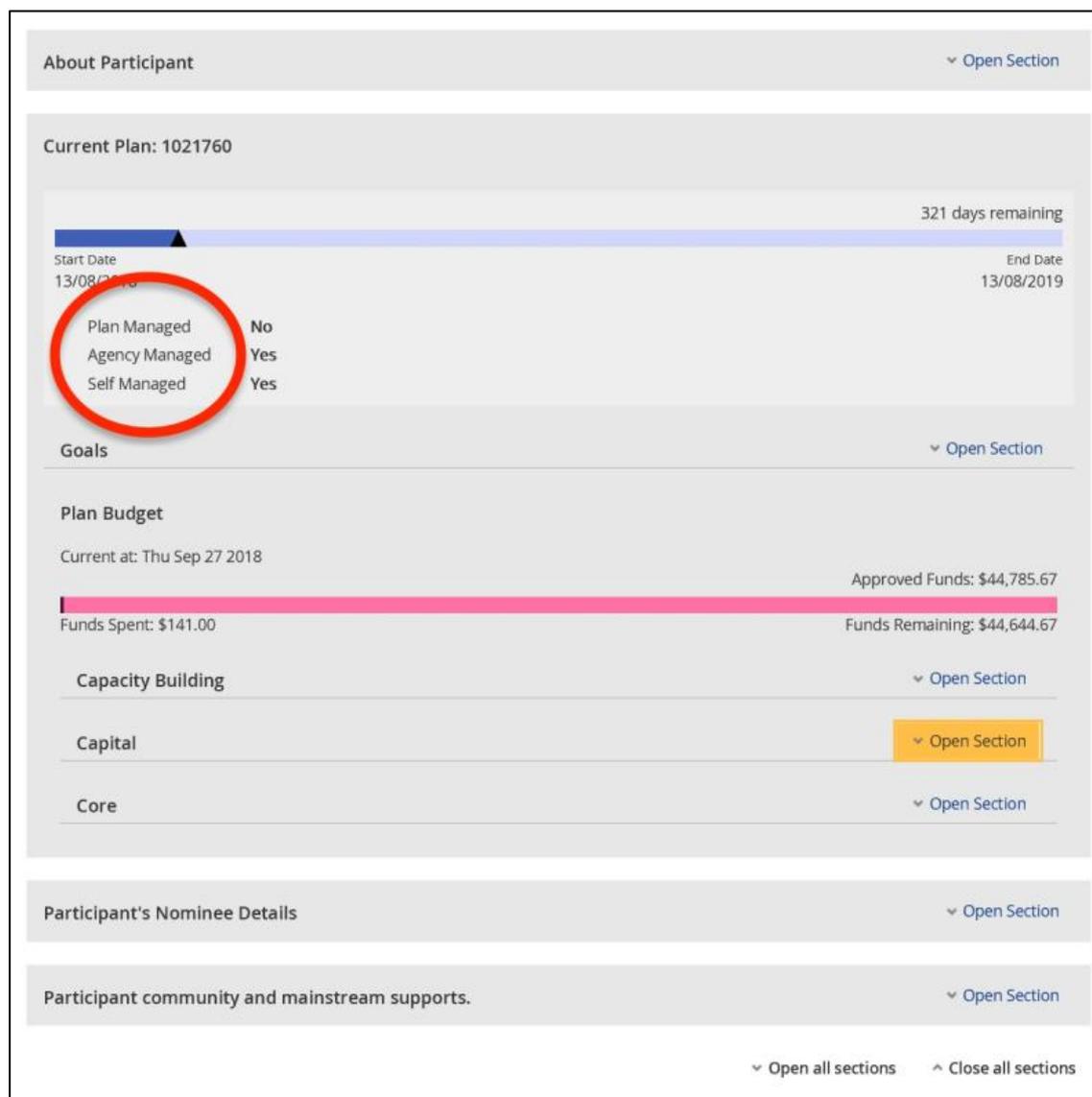
Consent to view plan notification

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 service 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:

- Create a new service booking with a participant.
- View and edit existing service bookings
- Accept or reject a new service booking including providing a reason for rejection
- Accept or reject a change to an existing service booking, including providing a reason for rejection
- Edit support details on a service booking including duration, price and quantity
- End a service booking including immediate cancellation
- Delete a service booking
- 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 the 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 SDA 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 SIL service bookings 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

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

Service Booking
Create and manage service bookings
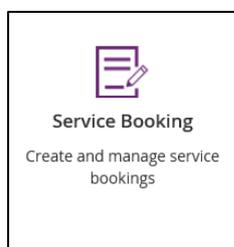
The **Service Booking** page displays.
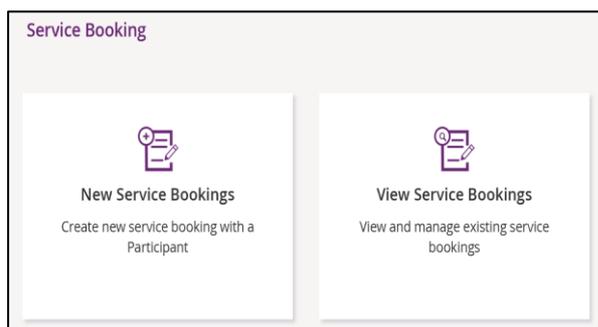
4. Select the **New Service Bookings** tile.

   The **Add** service booking page opens.
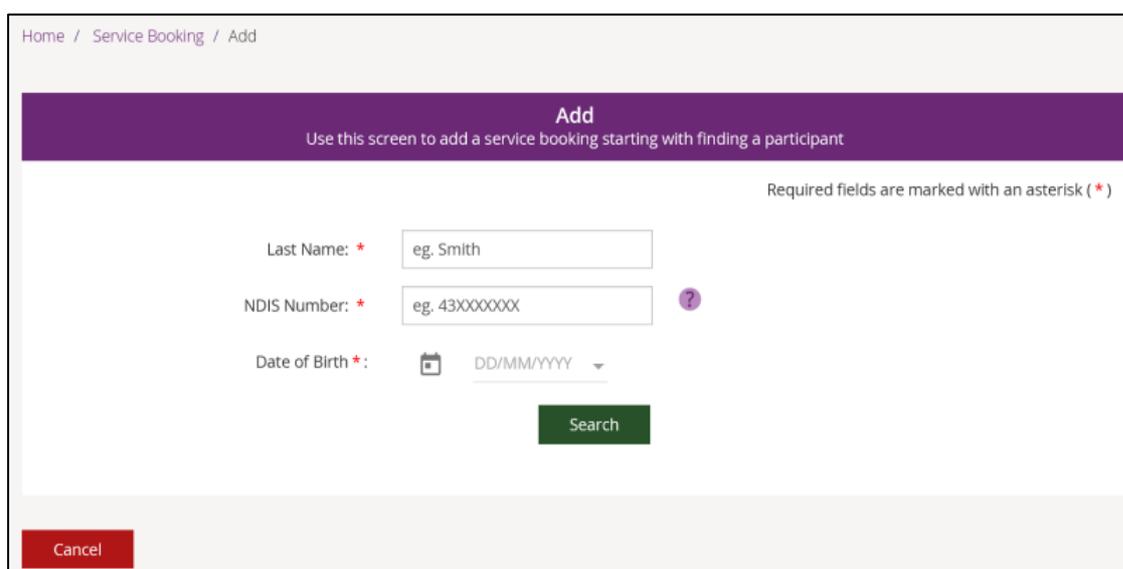
5. Enter the participant's **Last Name**, **NDIS Number**, **Date of Birth** and select **Search**.

   The **Service Booking Details** section (Step 1) opens.
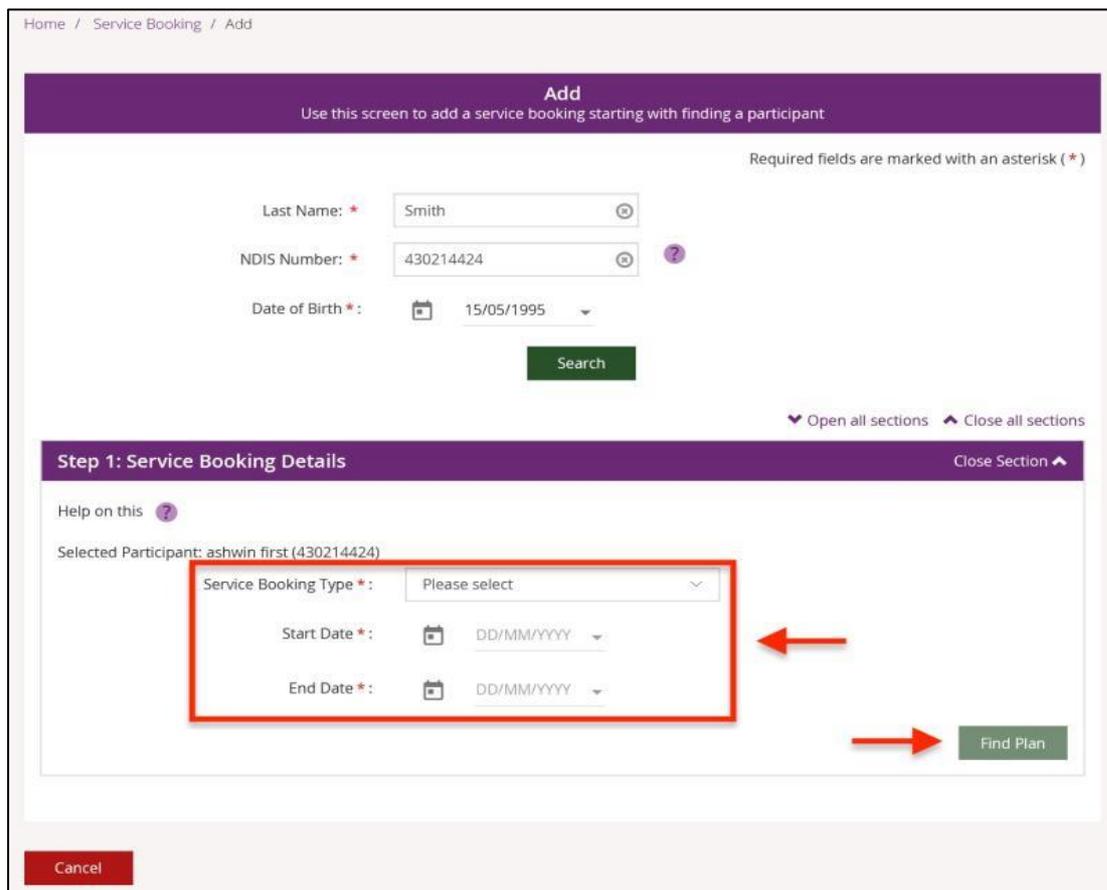
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6. Select the **Service Booking Type**. The types available are:

    - **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.
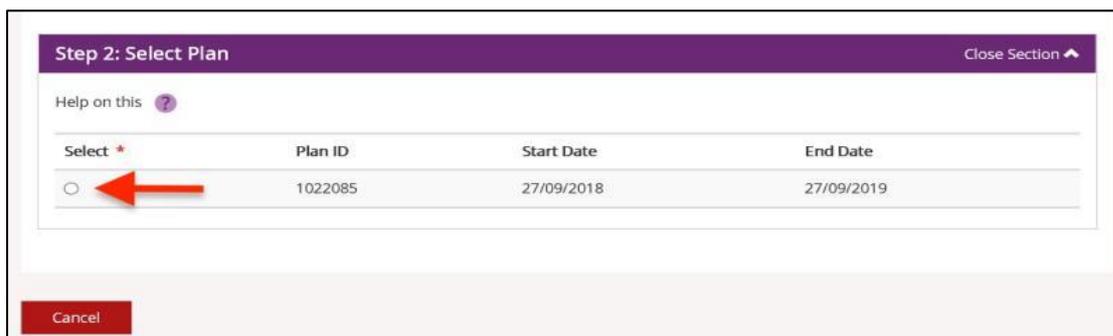
7. Select the button of the plan you want to work with.

The **Support Details** section (Step 3) opens.
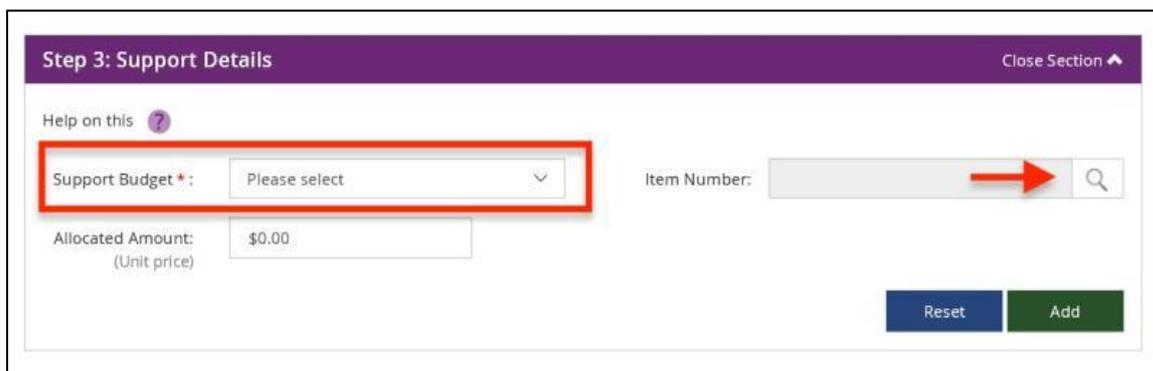
Note: The **Item Number** field (line item) is not mandatory unless the item is stated in the plan. Typically, an item is not stated but contact the participant to verify.

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**.

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

Added Details — Close Section ⌃
Help on this ?

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 ⌄	Item Number: 05_091203055_0103_1_2 🔍	
Allocated Amount: (Unit price) $400.00 ⊗	Quantity: 1 ⊗	
Item Name: Mobile Shower Commode - Child Transp		
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.
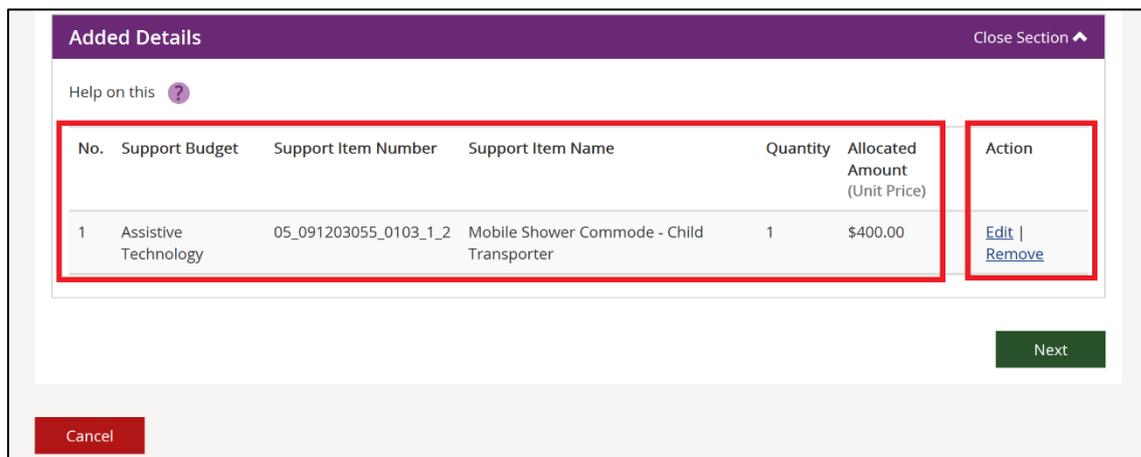
6. Once you have selected **Next** to continue, the booking and item details display. To edit the details of the service booking, select **Back**.

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**.
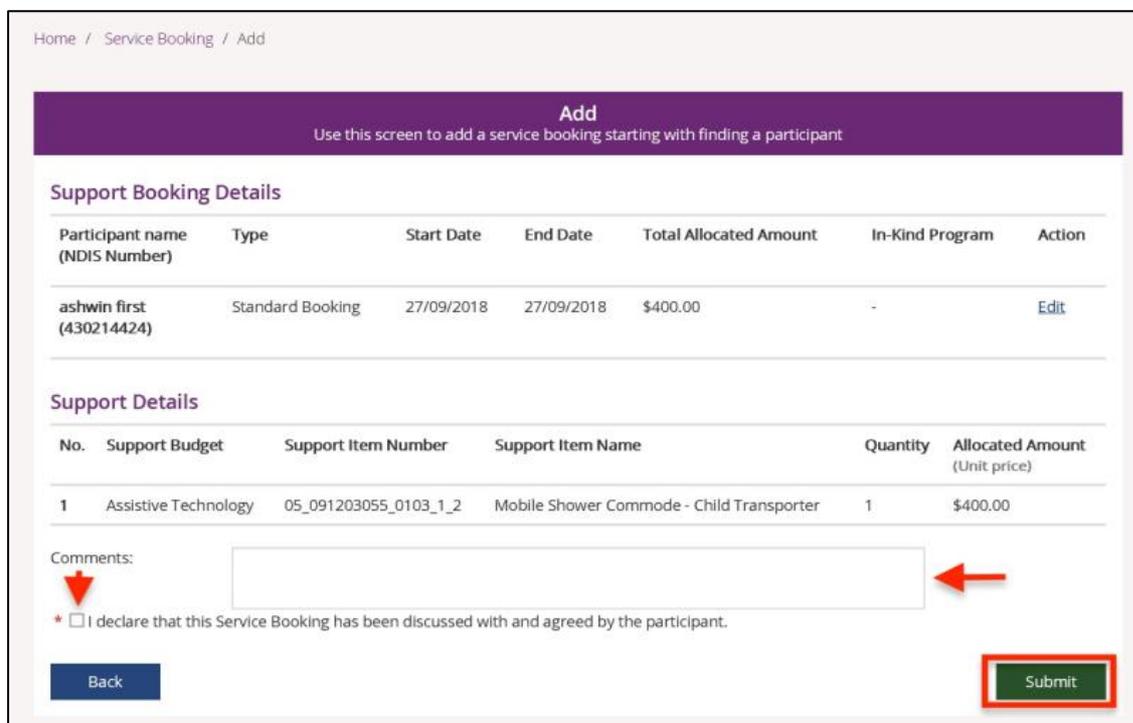
Note: The service booking is automatically approved for the participant when it is created. The booking confirmation page displays.

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.
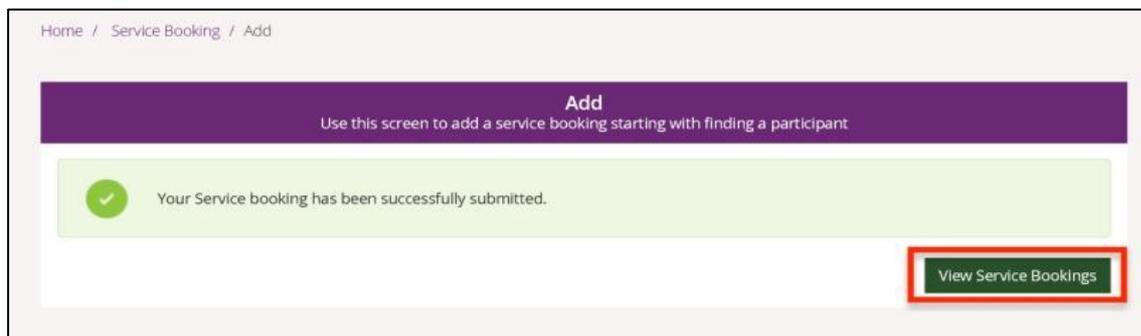
NOTE: For **Quotable items** NDIA will approve your quote and generally the related service booking is created automatically. In this case you are unable to create a service booking for quotable items (see Note for exceptions). Please refer to the **Quotation** section of this guide for further details.

NOTE: From 28th February 2022, Assistive Technology quotes valued under $15,000.00 no longer require a quote. You can create a service booking against an accepted line item for the price agreed with the participant (up to the allowable budget) in cases where a quotable Assistive Technology item has been automatically accepted but a service booking was not automatically created. These cases are usually identified by:

a) the funding for the item is now in the 'Available' funds, and

b) a comment has been added to the participant's plan to reflect this change (in some cases the participant will have an email to indicate this).

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.

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

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 details 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:

    a.   By entering a participant's name or NDIS number, or service booking number; then click the **Search** button.

    b.   By selecting from the **Initiated By** or **Status** dropdowns; 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). It can have payment requests made against it if the date of service delivery falls within the original service booking dates.

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Service Booking Status	Definition
Awaiting participant review	The participant needs to review the new service booking. **Please note**: If the participant does not have access to their myplace portal to review the service booking, you should contact the Agency.
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	The participant needs to review the updated service booking. **Please note**: if the participant does not have access to their myplace portal to review the service booking, please contact the Agency.

4. 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.

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

The details of the service booking display.

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.

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

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

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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**.

5. If you decide to reject the service booking, select a **Reason for Rejection** and select **Submit**.

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## 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.

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

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

ℹ️ Before proceeding with providing a decision please review the Revised Amount, Revised Quantity or the Revised End date columns as displayed above.

Decision * :   Please select ⌄

Please select

Accept

Reject

Back   Submit

Provider portal step-by-step guide

If you decide to accept the changes to the service booking, select **Accept** and select **Submit**.

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

ℹ️ 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]

Provider portal step-by-step guide

If you decide to reject the changes to service booking, select a **Reason for Rejection** and select **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

> ℹ 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 * : [Other ▼]

Rejection Explanation * : [   ]

255 characters remaining

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

[Back]   [Submit]

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.
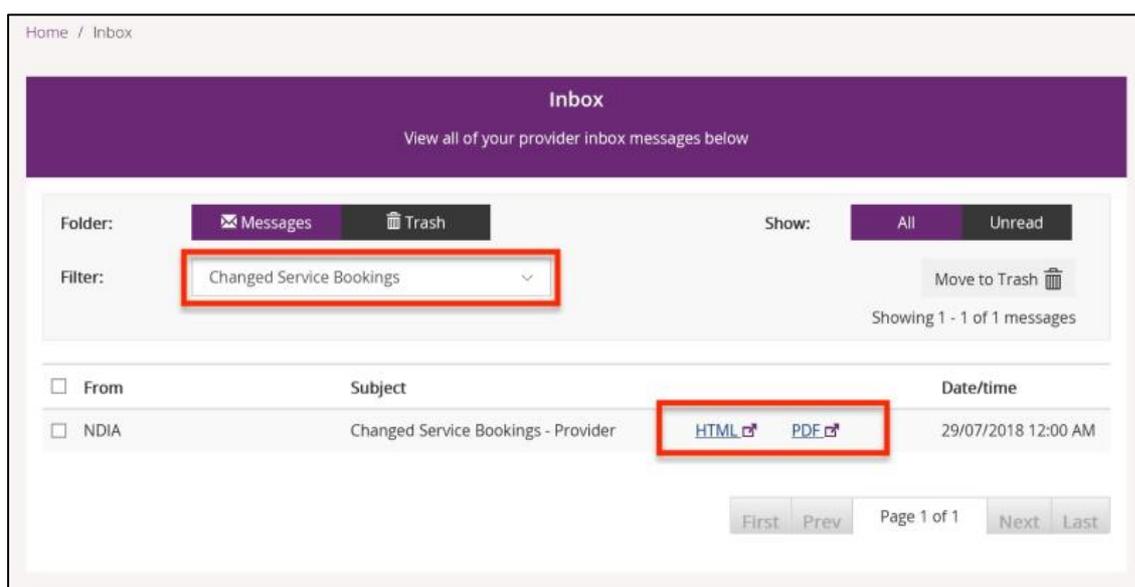
The notification summary of all service booking changes for all participants will be displayed:

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.

4. Select **Submit**.

Provider portal step-by-step guide

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	[ ]

☐ 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.
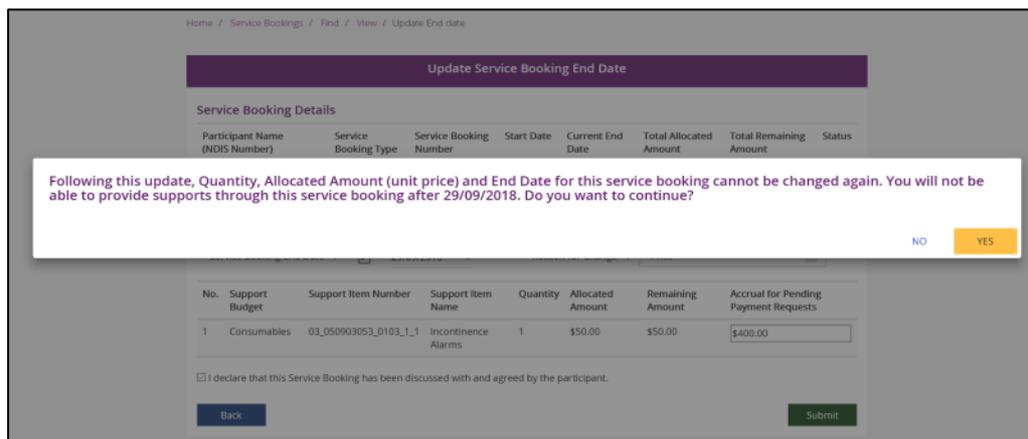
5. Select **Yes**.

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.

Provider portal step-by-step guide
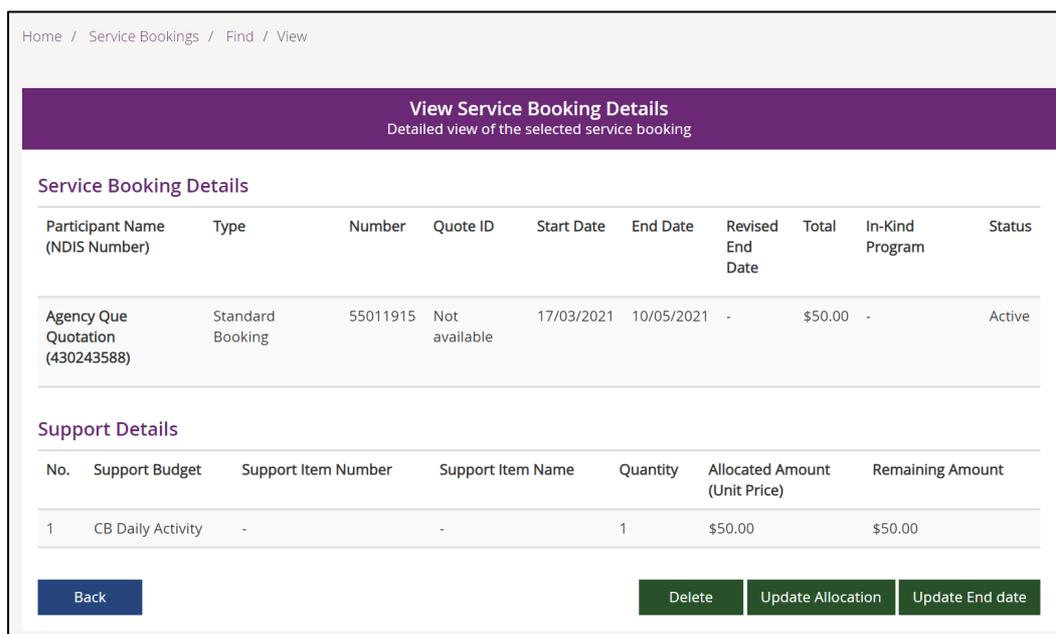
A warning will be displayed to confirm that once you delete it, the service booking will be removed from your list of services bookings permanently and you will not be able to provide services or request payment if you proceed.

4. Select **Yes**.

An information message confirms that the service booking has been deleted.

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.

Payment Request

Create and manage new and existing payment requests
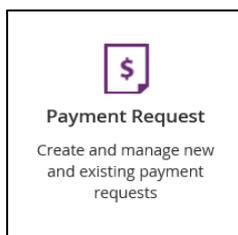
2. Select **Create Payment Request**.

ℹ️ Single payment request will no longer be available for PACE participants. You will need to use the Bulk Payment Request Upload functionality to make a payment request.

Payment Request

Create Payment Request	View Payment Request	Bulk Payment Request Upload	Payment Summary
Create new payment requests for the services you have provided to a participant	Search and view all payment requests that you have saved and submitted	Bulk upload payment request file for all the services provided to all participants.	Payment Summary

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.

Search Participant
Please search by First Name and Last Name or NDIS Number.

Required fields are marked with an asterisk (*)

Search by: *
Please select
Name
NDIS Number

Search

Cancel
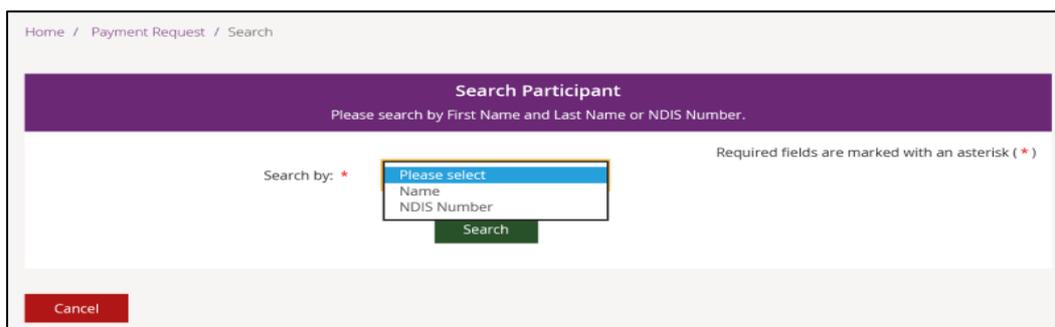
4. Enter the details of the participant for whom you need to submit a payment request and select **Search**. In this example, the participant's NDIS reference number is selected as the search criteria.

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

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

Note: Single payment request in no longer available for PACE Participants. You will need to use the Bulk Upload functionality to make a payment request.

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

8. 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.
   Note SIL providers: If claiming weekly, select the support category 'Core Daily Activity'.

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.
    Note SIL providers: If claiming weekly, select the weekly claiming **Support item number** specified in the NDIS Support Catalogue 2019-20 or the NDIS Pricing Arrangements and Price Limits.

New Payment Request

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

Participant Details

| Participant I... |
| NDIS Numbe... |

Payment R...

New Payme... asterisk (*)

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 Activit | 15_045_0128_1_3 | Community Engagement Assistance | 55012892 |

Close

11. Select the **Claim Type**. Refer to the NDIS Pricing Arrangements and Price Limits for further information on each claim type.

- The 'Assistance in Supported Independent Living - Weekly' claim type should be used when a SIL provider will claim weekly, under the conditions specified in the NDIS Pricing Arrangements and Price Limits

- 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.

- The 'Assistance in Supported Independent Living –Unplanned Exits' claim type should be used when there is an irretrievable breakdown of supports/relationship

which requires immediate exit. Refer to SIL Provider Guidance for further details around when this claim type can be used

- **Note**: **Assistive Technology and Home Modification providers** should refer to the [Assistive Technology, Home Modifications and Consumables Code Guide](#) on the NDIA [Pricing arrangements | NDIS](#) page for general claiming rules including AT Supplementary Charge codes and claiming for support items where notional unit prices apply.

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).
    Note SIL Providers: If claiming weekly, input the quantity as 1 to reflect 1 week.

14. Complete the **Payment Amount** field. This is the total amount being requested; it is not the unit price amount.
    Note SIL Providers: If claiming weekly, input the weekly 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.
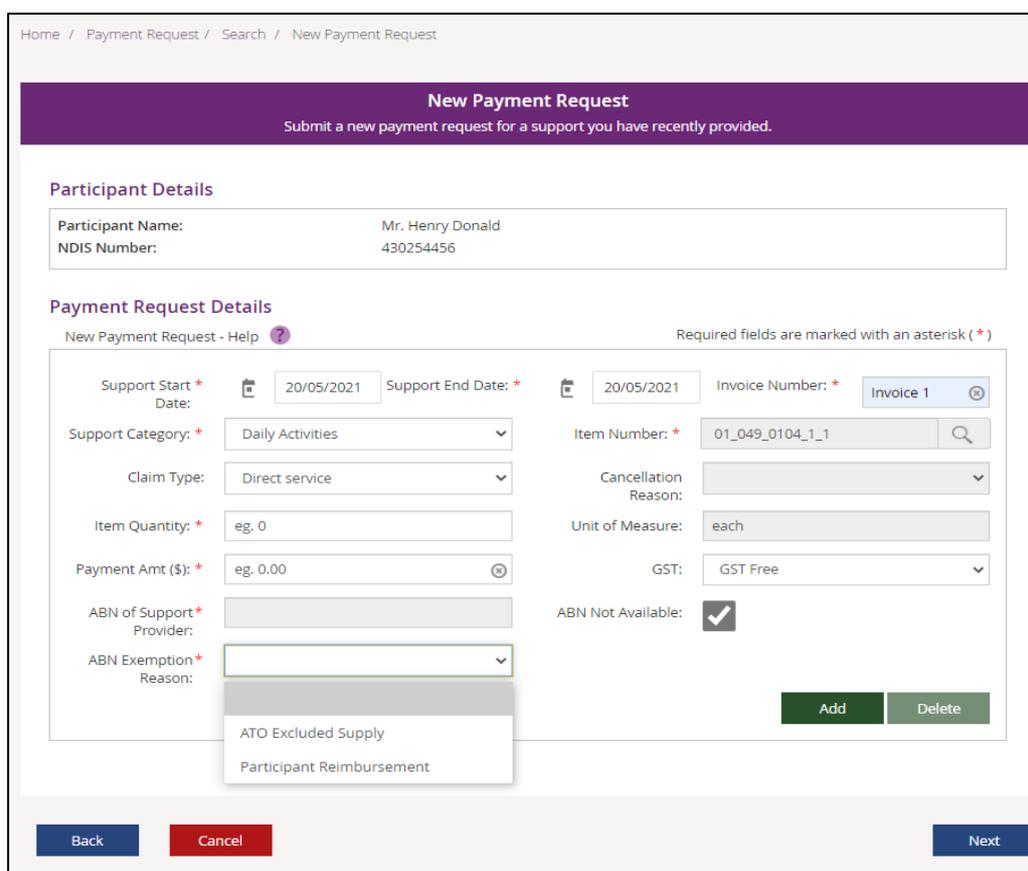
- If you are making a claim against a standard service booking, the ABN of the registered provider (that is, your ABN) automatically appears and is not editable.

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**.

Provider portal step-by-step guide

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 Limits 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.

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 25 to 31.
2. Select your Irregular SIL support service booking.

Provider portal step-by-step guide

The details of the service booking will display.

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

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.

Provider portal step-by-step guide

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	3500	$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 25 to 31

7. Select your Regular SIL support service booking

The details of the service booking will display.

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

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	-	-	1	$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.

Provider portal step-by-step guide

11. Create a new payment request following the steps in **Create a payment request**, pages 48 to 56.

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

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.
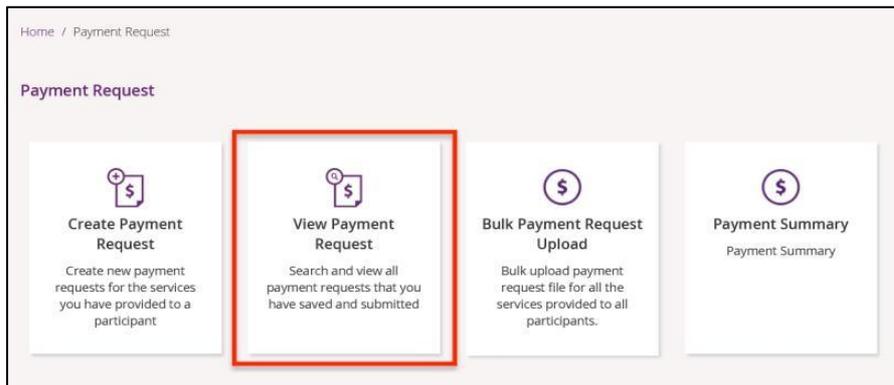
2. At **View By**, select **Submitted Payments Request** from the drop-down list.
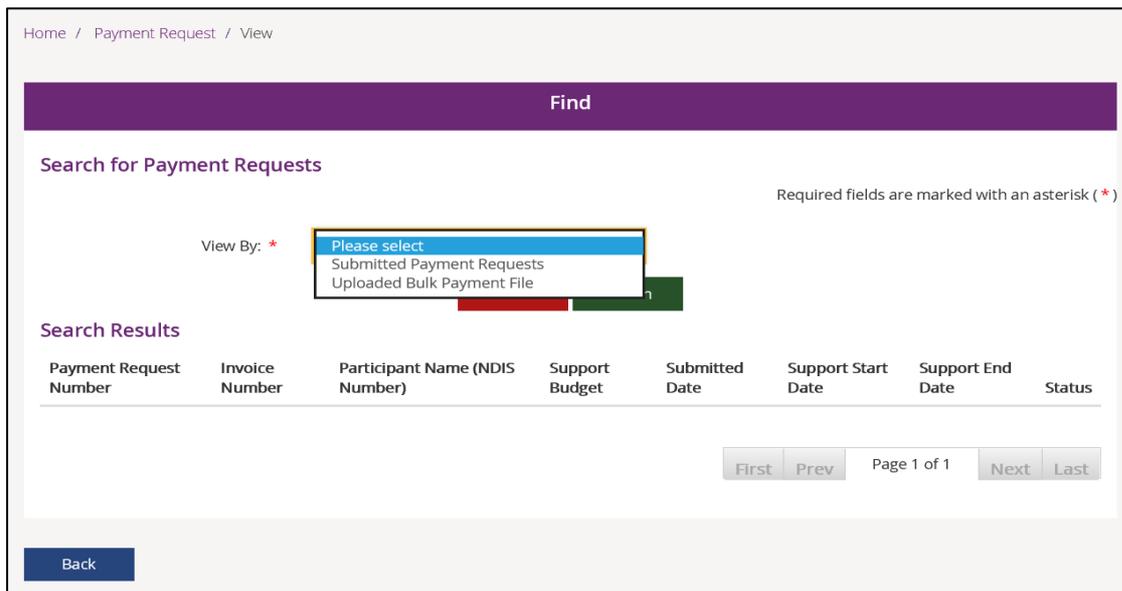
3. Select the **Search by** drop-down and select the desired search criterion.
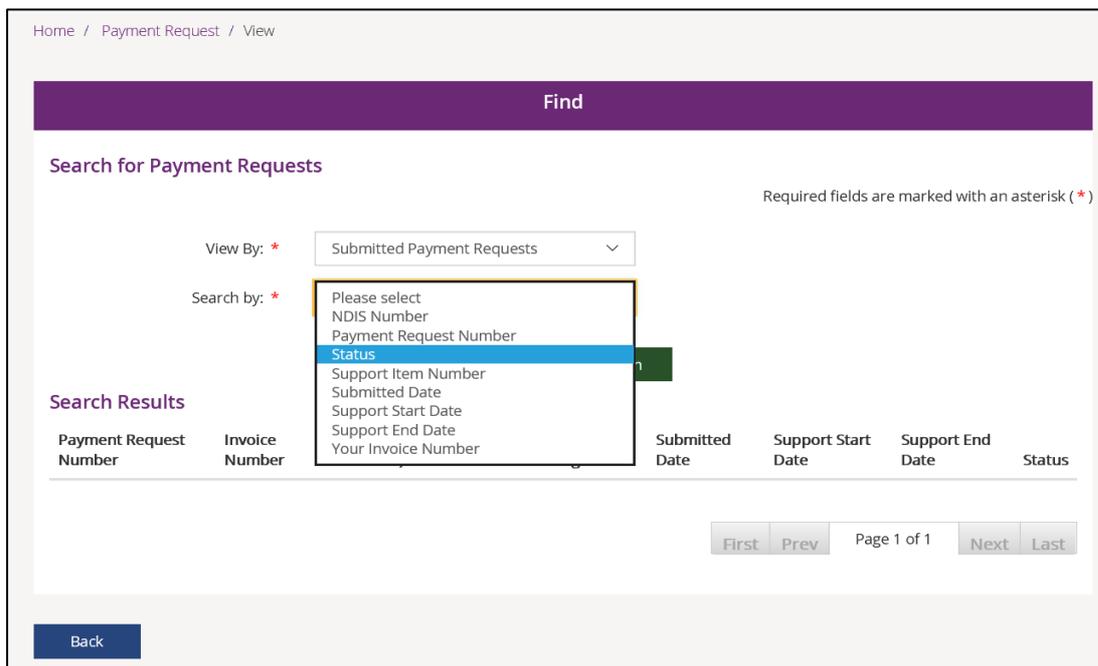
4. Enter your search criterion and select **Add to Criteria**. You can add multiple search criteria.
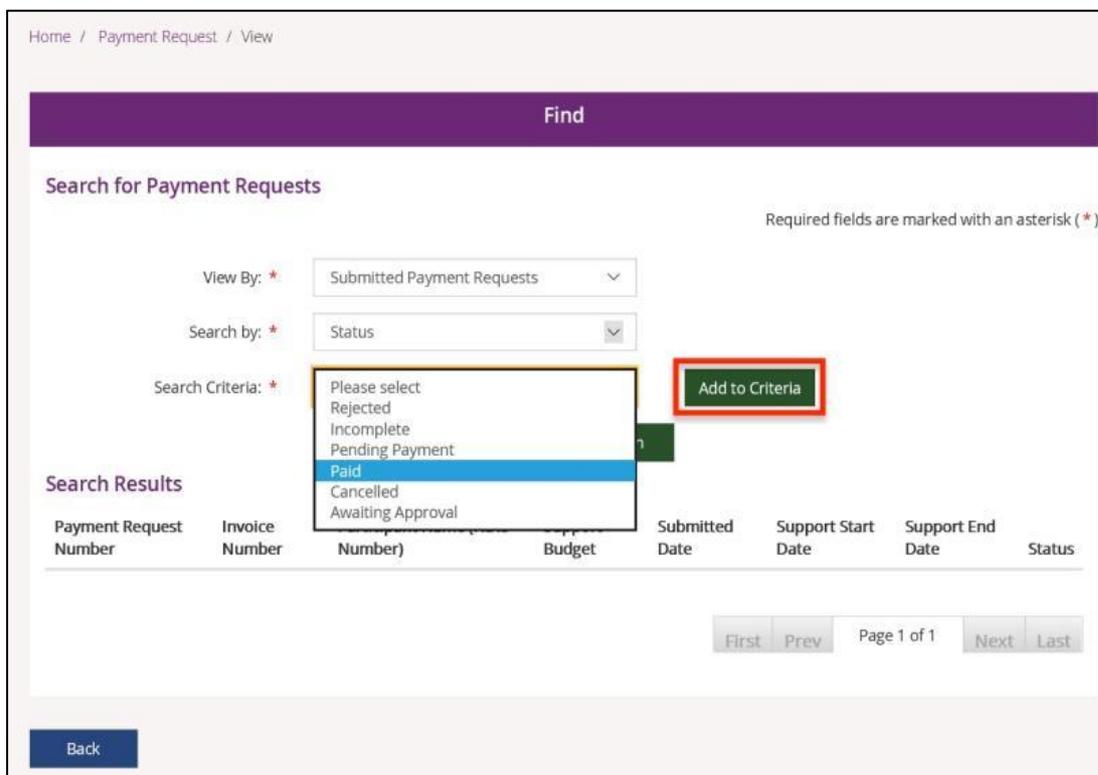
5. You can search by various criteria - rejected, incomplete, pending payment, paid, cancelled or awaiting approval. Select **Add to Criteria** to add more criteria to your search.

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.
Open	The payment request is waiting for validation from the participant.

Note: You will not be able to view the participant's name when a claim Rejected or Open status.

8. When the details of the payment request display, select **Back** to return to the previous page.

Provider portal step-by-step guide

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.

Provider portal step-by-step guide

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.

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.

2. Select **Cancel Payment**.

A message displays asking 'Are you sure you would like to cancel the selected payment?'

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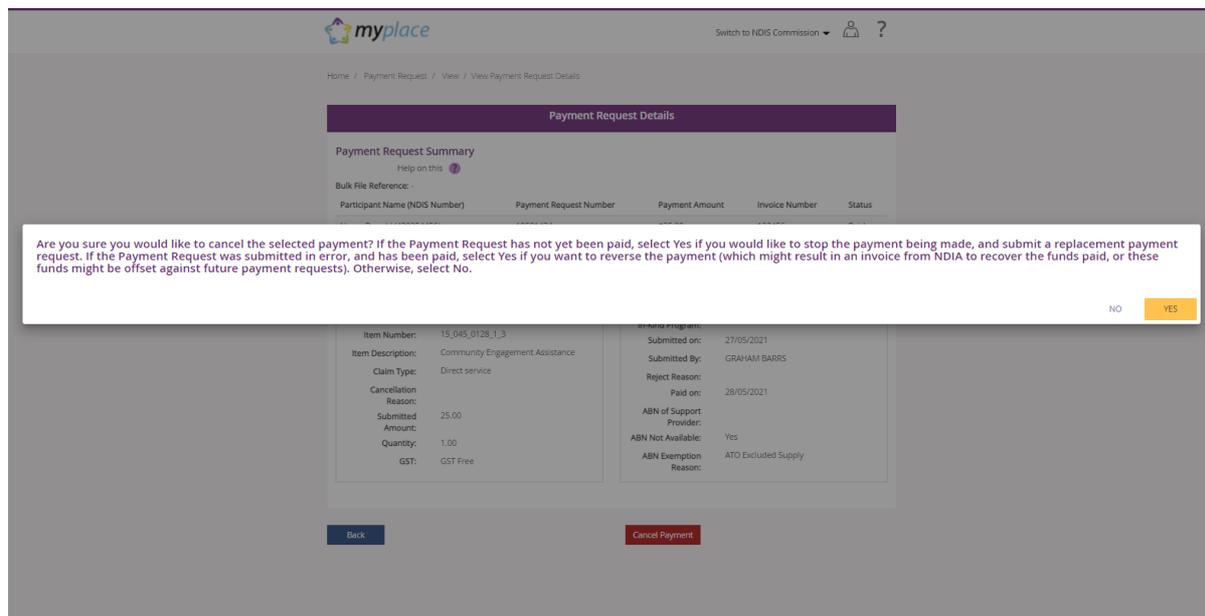
4. The following message displays. If you search again for the payment request you will see it now has a status of **Cancelled**.

The payment request was cancelled successfully.

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.

Provider portal step-by-step guide

Payment summary

You can view a summary of the payment requests and advance requests 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.
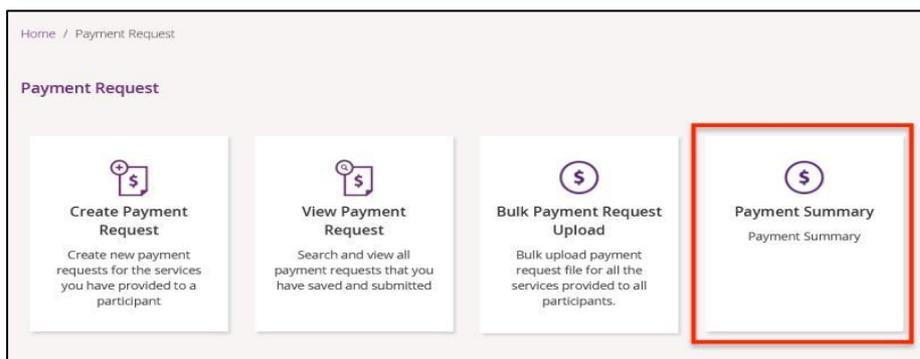
- Enter the **From Date** and **To Date** of the summary (up to a 30-day period).

Note: This is the date that the payment was requested.

Note: You can view you Pending Payment Request, Advance Summary and Advance Recovery Instalment Plan by selecting **Open Section.**

2. Select **Find Summary**.

3. Select **Open Section** to view the summary details.

- Select **Rightwards Arrow** to view each Payment Run Date payment summary

Provider portal step-by-step guide

![ndis logo]
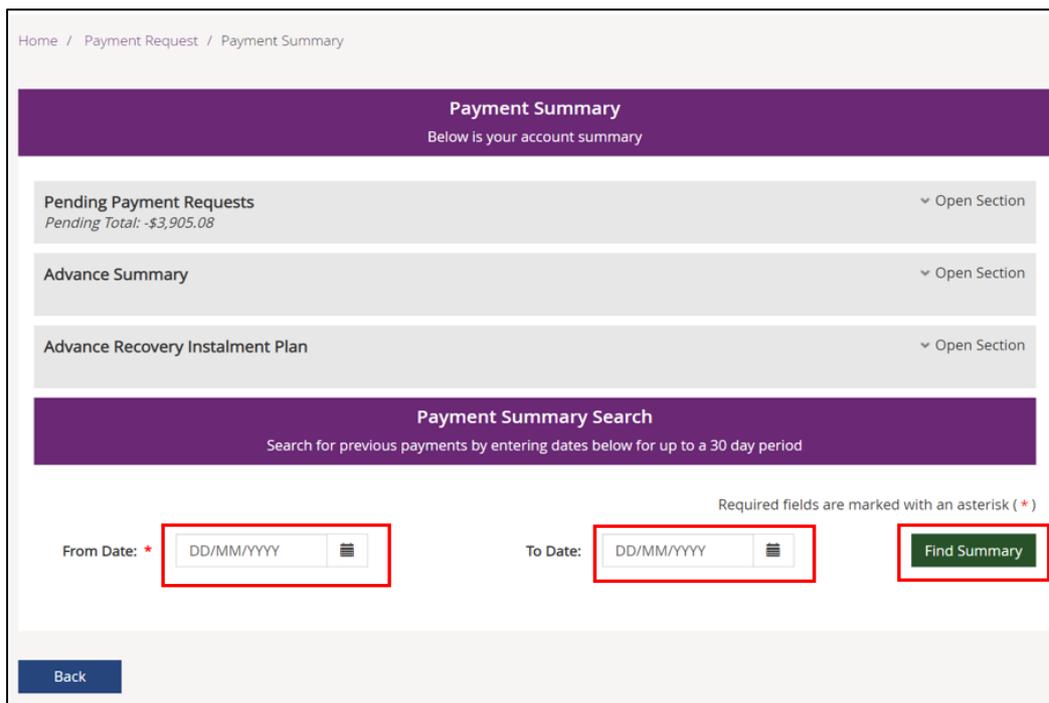
- Select **Download Results**

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: * 03/01/2022 📅   To Date: 31/01/2022 📅   **Find Summary**

Paid Payment Requests   ⌃ Close Section
Paid Total: $19,959.85

	Payment Run Date	Bank Payment Reference		Total Amount
▾	20/01/2022	007700000937		$19,423.95

|	Paid On	Payment Request Number	Participant Name	Description	Amount
▸	21/01/2022	10603384	Covid 19 Vaccine Reimbursement (430256091)	Daily Activities	$12.50
▸	21/01/2022	10603383	Covid 19 Vaccine Reimbursement (430256091)	Daily Activities	$12.50
▸	21/01/2022	10603382	Covid 19 Vaccine Reimbursement (430256091)	Daily Activities	$12.50
▸	21/01/2022	10603381	Covid 19 Vaccine Reimbursement (430256091)	Daily Activities	$12.50
▸	21/01/2022	10603380	Covid 19 Vaccine Reimbursement (430256091)	Daily Activities	$12.50
▸	21/01/2022	10603375	Covid 19 Vaccine Reimbursement (430256091)	Daily Activities	$12.50
▸	21/01/2022	10603376	Covid 19 Vaccine Reimbursement (430256091)	Daily Activities	$12.50
▸	21/01/2022	10603377	Covid 19 Vaccine Reimbursement (430256091)	Daily Activities	$12.50
▸	21/01/2022	10603379	Covid 19 Vaccine Reimbursement (430256091)	Daily Activities	$12.50
▸	21/01/2022	10603378	Covid 19 Vaccine Reimbursement (430256091)	Daily Activities	$12.50

First	Previous	Page 1 of 34	Next	Last

Download Results

| ▸ | 20/01/2022 | 007100000977 | | $60.00 |

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.
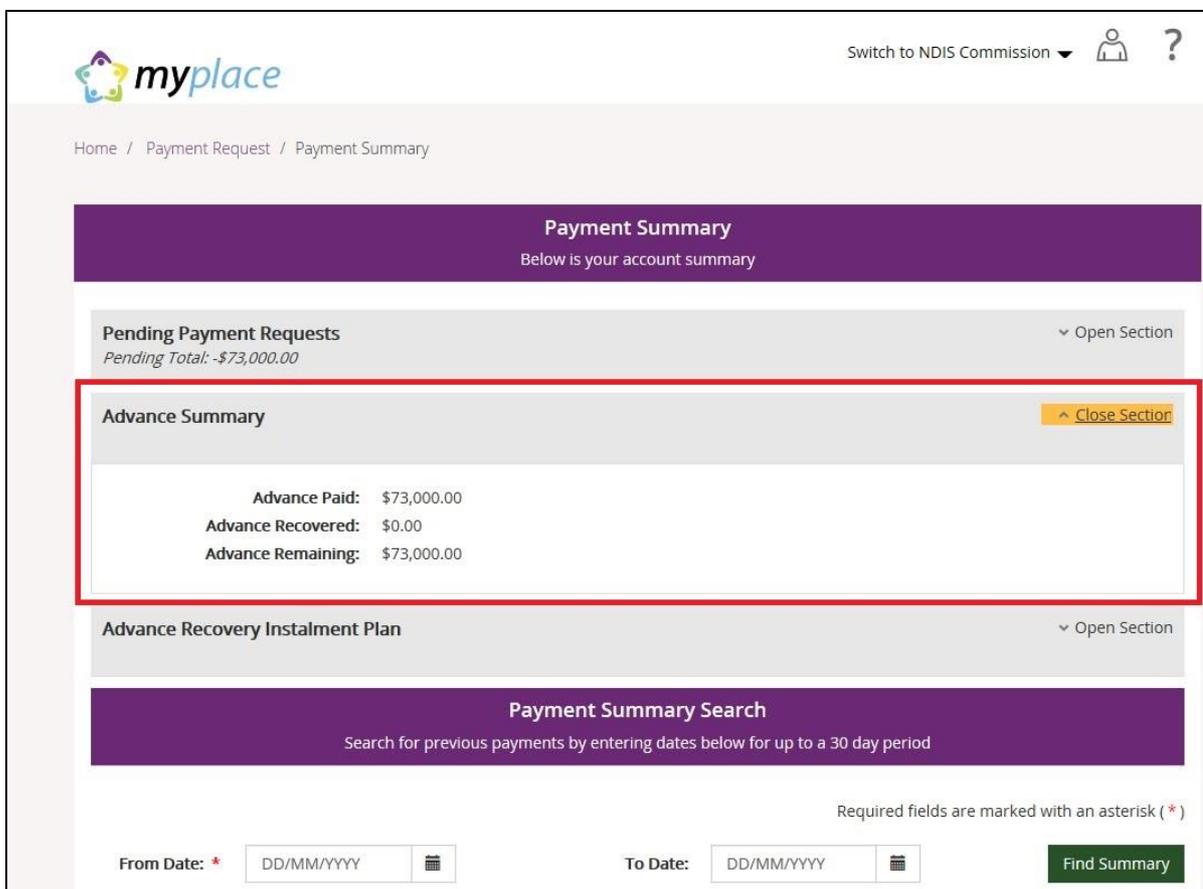
2. Go to **Advance Recovery Instalment Plan** and select **Open Section**.
   The section displays a detailed table of each instalment in the recovery plan by recovery date, recovery instalment amount, recovered amount and remaining amount.

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 do not 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.

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

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.

Note: From 28th February 2022, Assistive Technology quotes valued under $15,000.00 no longer require a quote. You can create a service booking against an accepted line item for the price agreed with the participant (up to the allowable budget) in cases where a quotable Assistive Technology item has been automatically accepted but a service booking was not automatically created. These cases are usually identified by:

a) the funding for the item is now in the 'Available' funds, and

b) a comment has been added to the participant's plan to reflect this change (in some cases the participant will have an email to indicate this).

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.
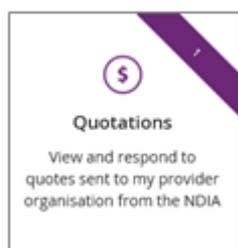
The **Quotations** page opens and your quotes will be displayed. The results will be organised under the following column headers:

- **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:
    o Awaiting provider response
    o NDIA has received response

o   Quote has expired

o   Archived

o   Quote is accepted

o   Quote was unsuccessful

o   Quotation open

- 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   Enter participant name or NDIS number   ∨ Refine search   Search

Search results

Showing 1 - 10 of 478 quotations   Sort by   Quote ID   ∨

Quote ID	Participant name (NDIS number)	Date requested	Quote type	Description	Item	Status
5006097	RitaCM1 TayroCM1 (430258007)	22/02/2022	Assistive - Repair	Wheelchair - Powered Stair Climbing	05_122315143_0105_1_2	Awaiting provider response
5006096	RitaCM1 TayroCM1 (430258007)	22/02/2022	Assistive - Repair	Wheelchair - Powered With Powered Seat E	05_122306138_0105_1_2	Awaiting provider response
5006095	LikeoCM1 ByotCM1 (430258006)	22/02/2022	Assistive - Repair	Wheelchair - Powered Stair Climbing	05_122315143_0105_1_2	Awaiting provider response
5006094	LikeoCM1 ByotCM1 (430258006)	22/02/2022	Assistive - Repair	Wheelchair - Powered With Powered Seat E	05_122306138_0105_1_2	Awaiting provider response
5005981	Jessica Meyer (430257334)	04/02/2022	Assistive - New	Wheelchair - Manual Tilt In Space - Annu	05_122203120_0105_1_2	Awaiting provider response
5005972	Jessica Meyer (430257334)	28/01/2022	Assistive - New	Wheelchair - Manual Tilt In Space - Annu	05_122203120_0105_1_2	Quote is accepted
5005970	Gene Harper (430257332)	28/01/2022	Assistive - New	Scooter - Composite	05_418_0105_1_2	Quote is accepted

3.   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.

Provider portal step-by-step guide

![ndis logo]

Quotations

Below is a listing of quotations requested by the NDIA

Quotations - help ❓

Find a participant	Enter participant name or NDIS number		▲ Refine search	Search
Quote ID	Please enter 7 digits	Date requested	dd/mm/yyyy	🗓
Quote type	Please select ⌄	Status	Please select ⌄	

Search results

Showing 1 - 10 of 478 quotations   Sort by Quote ID ⌄

Quote ID	Participant name (NDIS number)	Date requested	Quote type	Description	Item	Status
5006097	RitaCM1 TayroCM1 (430258007)	22/02/2022	Assistive - Repair	Wheelchair - Powered Stair Climbing	05_122315143_0105_1_2	Awaiting provider response
5006096	RitaCM1 TayroCM1 (430258007)	22/02/2022	Assistive - Repair	Wheelchair - Powered With Powered Seat E	05_122306138_0105_1_2	Awaiting provider response
5006095	LikeoCM1 ByotCM1 (430258006)	22/02/2022	Assistive - Repair	Wheelchair - Powered Stair Climbing	05_122315143_0105_1_2	Awaiting provider response
5006094	LikeoCM1 ByotCM1 (430258006)	22/02/2022	Assistive - Repair	Wheelchair - Powered With Powered Seat E	05_122306138_0105_1_2	Awaiting provider response
5005981	Jessica Meyer (430257334)	04/02/2022	Assistive - New	Wheelchair - Manual Tilt In Space - Annu	05_122203120_0105_1_2	Awaiting provider response
5005972	Jessica Meyer (430257334)	28/01/2022	Assistive - New	Wheelchair - Manual Tilt In Space - Annu	05_122203120_0105_1_2	Quote is accepted
5005970	Gene Harper (430257332)	28/01/2022	Assistive - New	Scooter - Composite	05_418_0105_1_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

1. 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.

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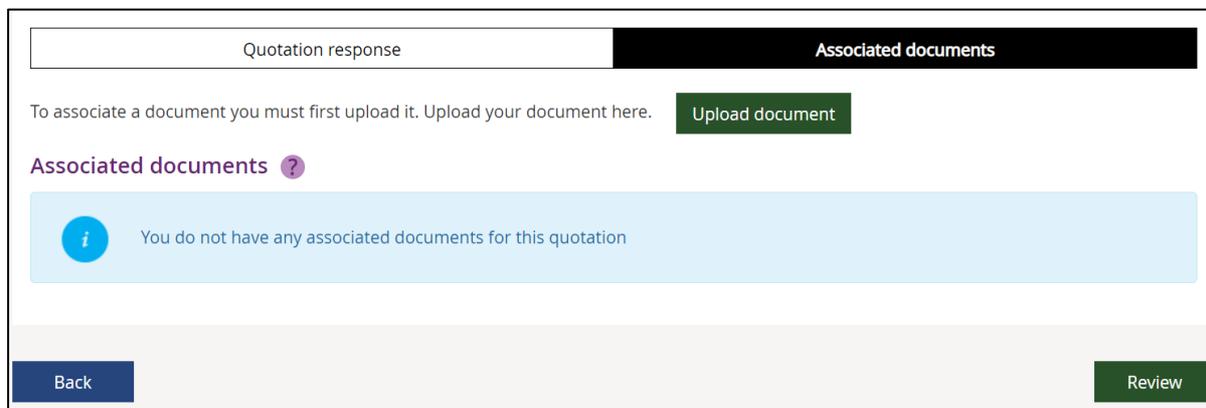
The **Associated documents** tab displays. It lists any documents you have previously associated with your response to this quotation. If you have not previously uploaded any documents, the message will display 'You do not have any associated documents for this quotation'.

If you have previously uploaded a document, you will see it listed.
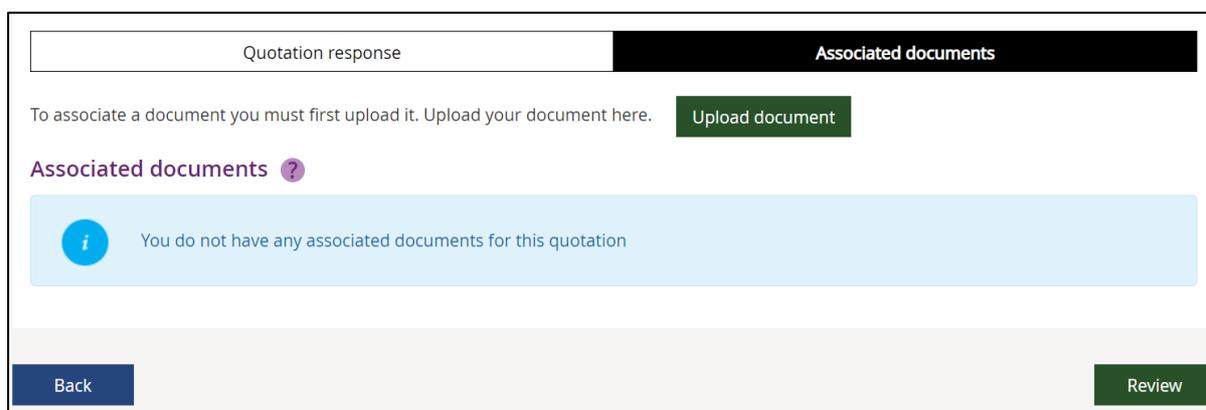
Select the **Document name** if you want to download and view the document. You will be taken through a set of document download instructions.

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**.

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
1031628	Example document	Example document	28/02/2022

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: *	5006094
Document name: *	eg. Example Document
Description:	eg. Example Description
Choose file: *	Choose File.(Max size 10MB) 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.

Provider portal step-by-step guide

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.

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.

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

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

Successfully submitted your quote

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

Quotation Details
View and respond to quotation request

Quotation request ?

Quote ID:	5006094	Reply by date:	22/03/2022
Status:	NDIA has received response	Item:	05_122306138_0105_1_2
Participant NDIS number:	430258006	Item description:	Wheelchair - Powered with Powered Seat Elevation
Participant name:	LikeoCM1 ByotCM1	Quantity:	1.00
Date requested:	28/02/2022	Quote type:	Assistive - Repair

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.

Referrals
View referrals made to my provider organisation

The list of referrals opens.

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

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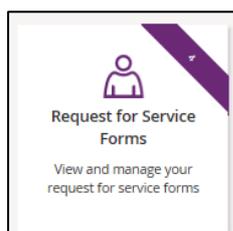
2. The full list of **Request for Service Forms** displays. It shows the complete list of requests for service issued to your organisation.

---

3. You can search for specific requests for service by participant name or NDIS number.
   Note: Request for Service for approved PACE participant can be viewed in the my NDIS provider portal.

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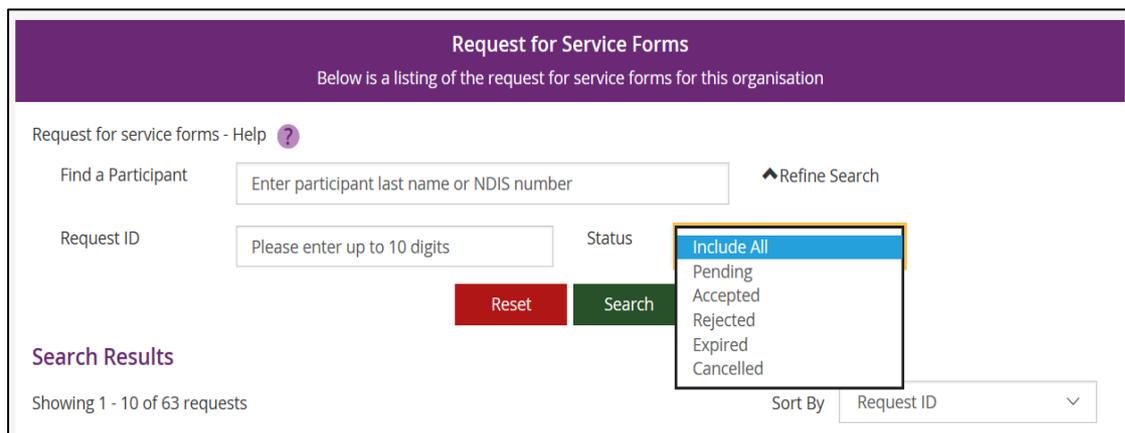
5. You can also sort the results in the **Sort By** drop-down by **Request ID** and **Status**.

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**.

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

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.

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 pln.

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**.

643143	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

3. 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.

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**.

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

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.
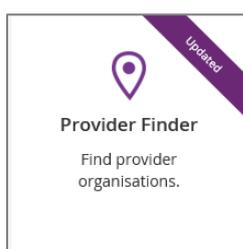
The **Provider Finder** page displays.

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.

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.
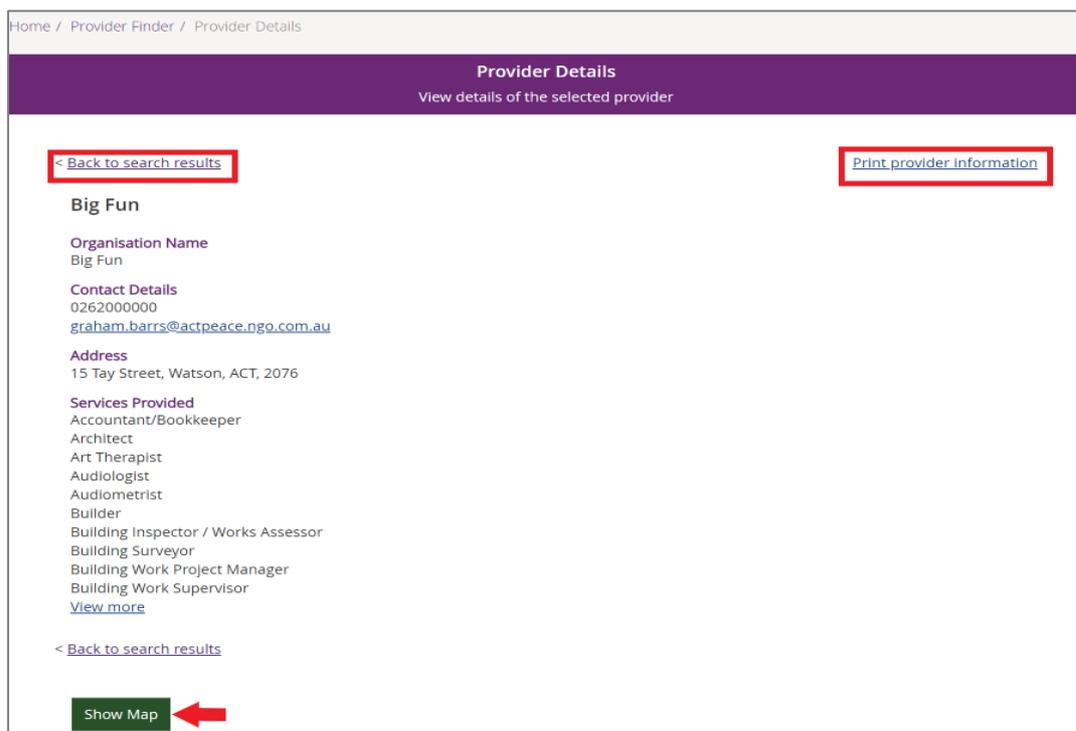
5. Select **Show Map** to view the location of the provider. You can print the search results by selecting **Print provider information.** Or select **Back to search results** to return to the search results.
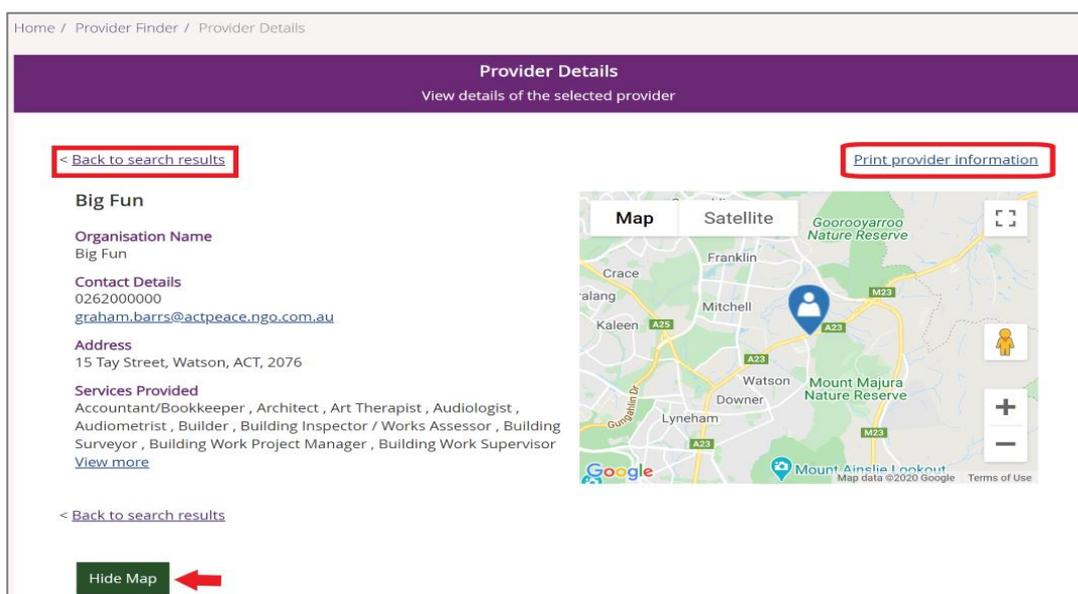
6. You can print the search results by selecting **Print provider information** or **Hide Map** to return to the Provider Details page. Select **Back to search results** to return to the search results.

Upload evidence

For some processes (e.g. Quotations, NDIA Registrations) 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.

Upload Evidence
Document Upload
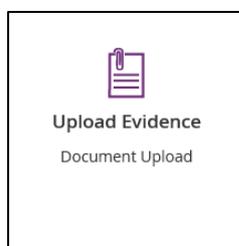
The **Document Upload** page displays.

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.

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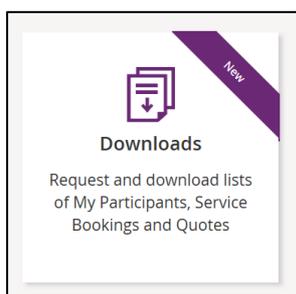
2. After you click the **Downloads** tile, you will see a new tile screen with these options:

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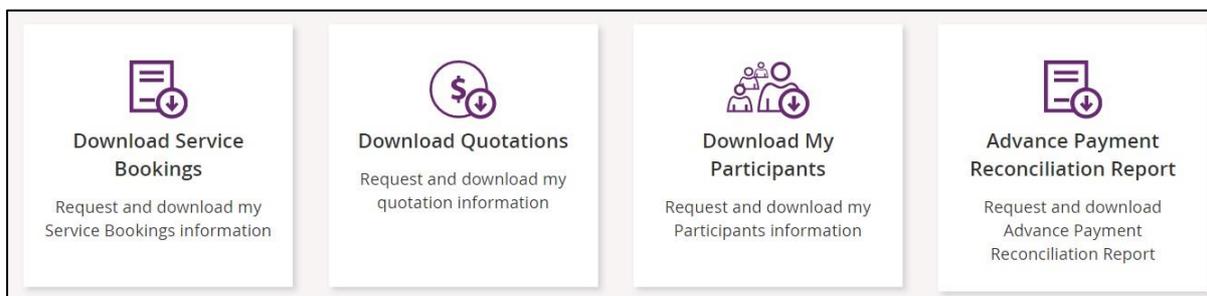
Download Service Bookings

This tile allows you download reports listing all the active service bookings you have with participants.

Provider portal step-by-step guide
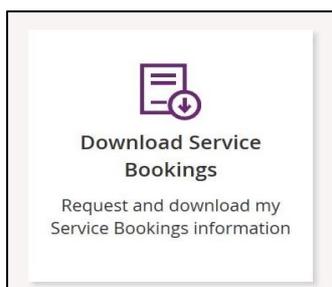
1. Select **Download Service Bookings** to request and download a report containing your service bookings information.

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	Download Quotations	Download My Participants	Advance Payment Reconciliation Report
Request and download my Service Bookings information	Request and download my quotation information	Request and download my Participants information	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 ae 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.
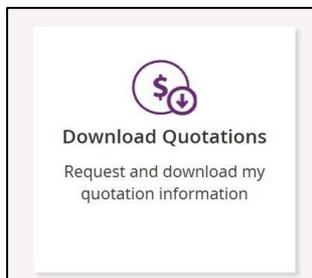
1. Select **Download Quotations** to request and download your quote requests.

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.
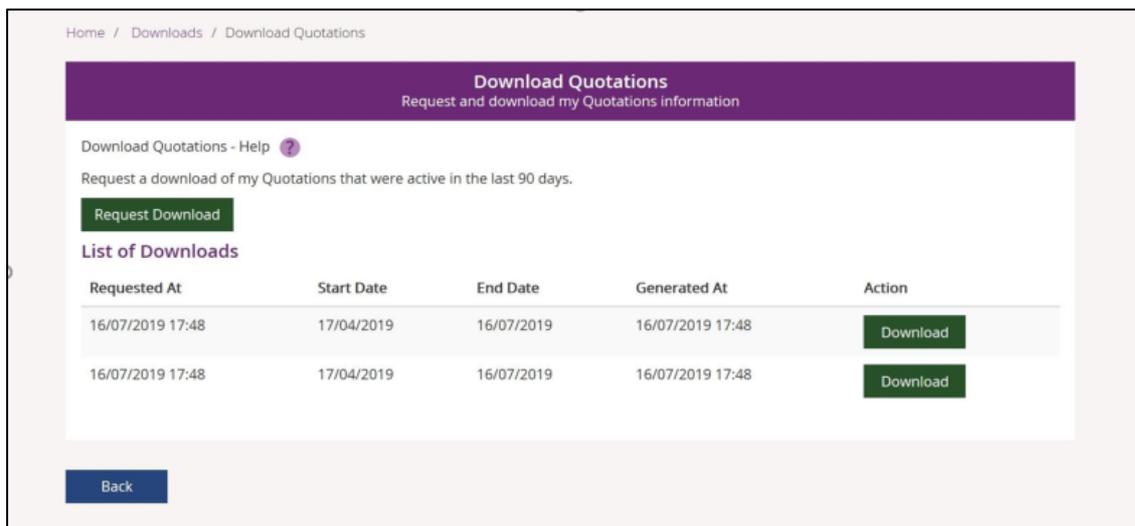
2. Select **Request Download**. Or select **Back** to go back to the **Downloads** page.

    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.
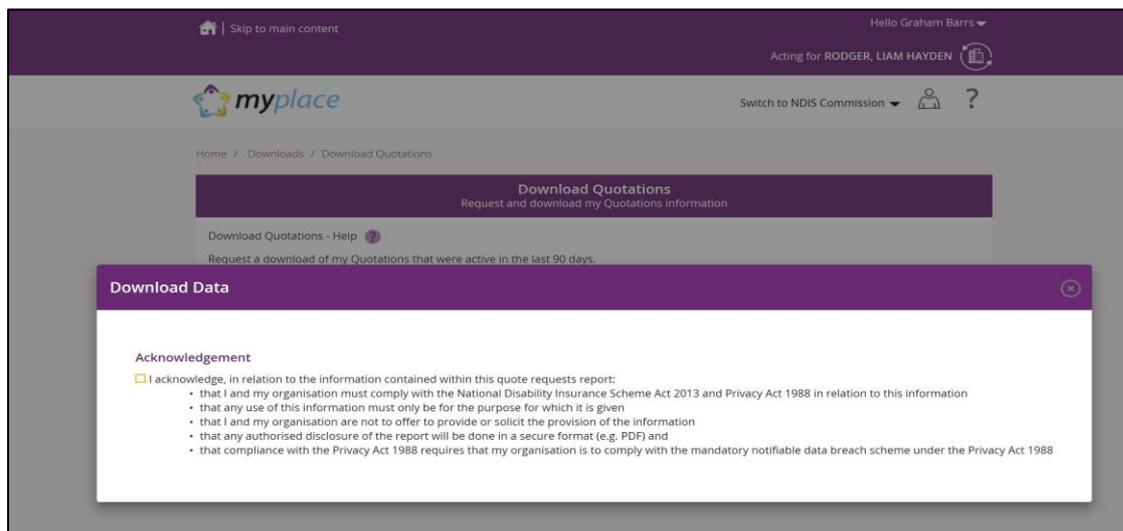
- After you check the **Acknowledgement** box, the popup window will expand to display a number of file format download options.
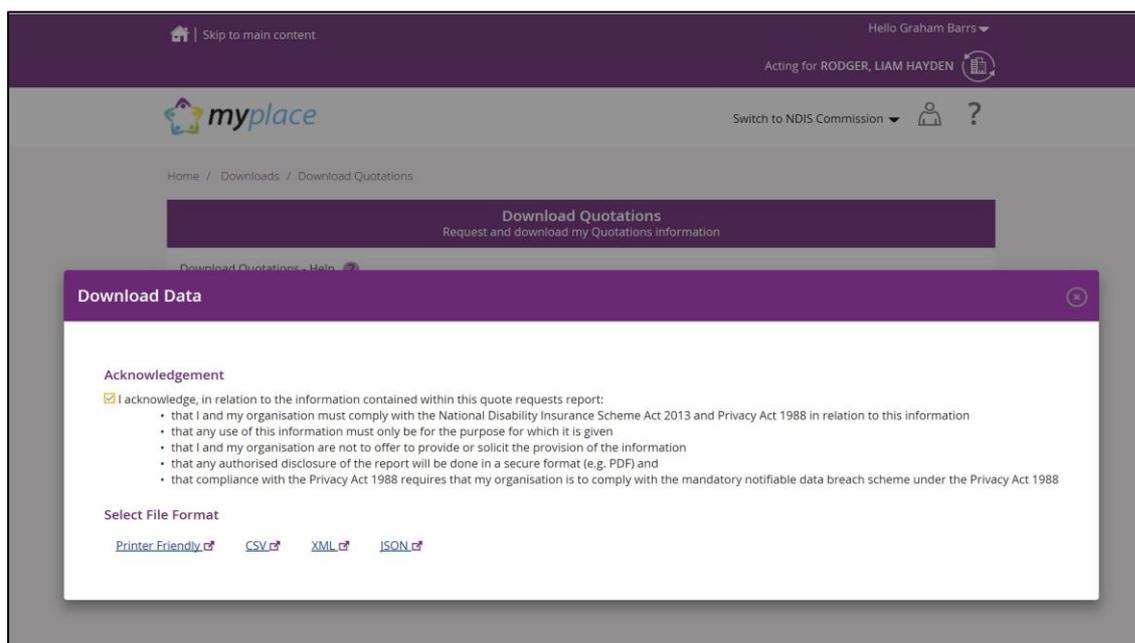
You have a choice of 4 format types depending on your business needs. They are:

- 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.
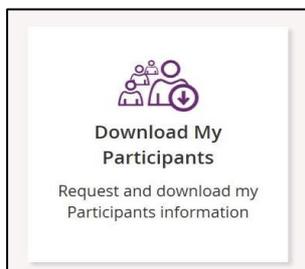
1. Select **Download My Participants** to request and download your participant's information.

   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.

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 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.

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.
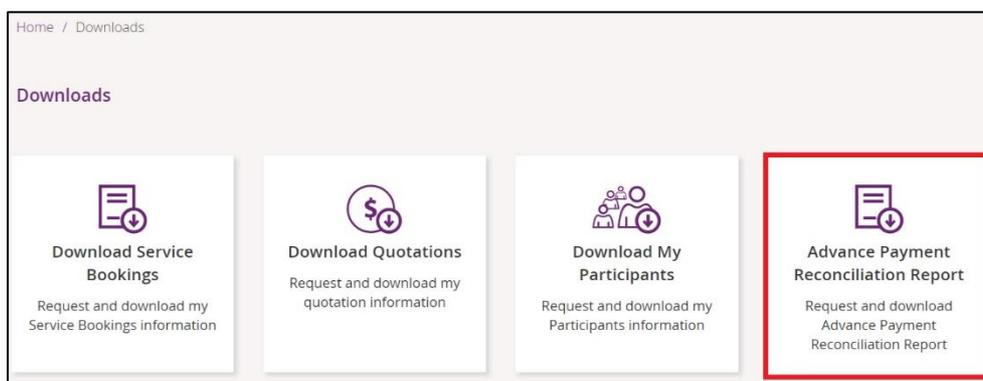
1. Select **Advance Payment Reconciliation Report**.

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.

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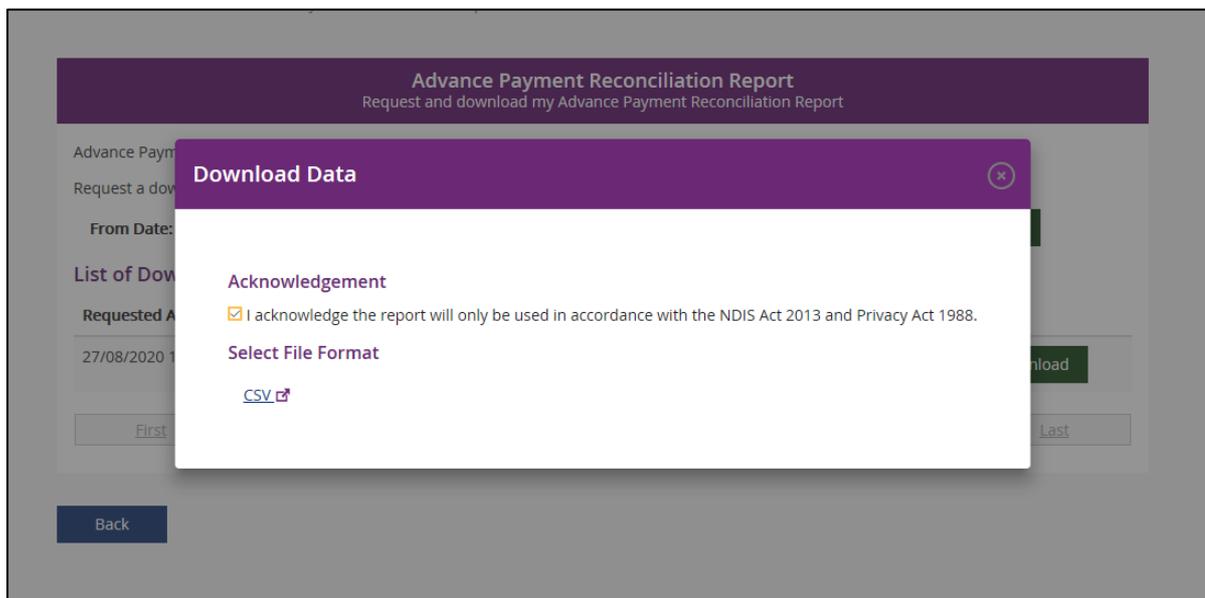
6. Click the **CSV** link to download the report.

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.