

my NDIS provider portal

February 2026

Table of Contents

Changes from the last version	4
Introduction	5
What can I do in my NDIS provider portal?	5
Minimum browser requirements	5
Provider Learning Environment	6
How to contact NDIS.....	7
Access my NDIS provider portal.....	8
Set up your Digital ID and link to your business in RAM.....	10
Dashboard.....	10
Broadcast messages.....	11
Notifications.....	12
NDIS Quality and Safeguards Commission.....	12
Need some help with using my NDIS provider?	12
Quick links	13
Selecting an organisation.....	13
Switching Portals.....	13
Notification Centre.....	14
my NDIS provider portal navigation.....	16
My Participants	17
Counter for New Participants	18
Maximum display of 2000 records on the My participant’s page	18
Sorting the participant relationships table	19
Search for and select a participant	19
View participant details	22
About Me	22
Goals	22
Budget.....	23
Funded Supports.....	28
Informal community and mainstream support	30
Participant nominee details.....	31
Provider roles.....	31
Extend or End provider roles	31
Request for Service	33
View Support Coordination Requests for Service.....	33
Maximum display of 2000 Requests on the Request history page.....	34

Respond to a Request for service	37
To Accept	37
To Decline.....	38
View the details of an accepted Request for service	39
Contact Details	40
Participant context.....	40
Reporting tasks	40
Submitted reports.....	40
Reporting tasks	40
Uploading reports for a Request for service.....	41
Organisation.....	43
View Organisation details	43
View Employee details.....	44
Relationship request tab for Registered Providers.....	45
Maximum display of 2000 requests on the Relationship requests page.....	46
Submit a new relationship request.....	46
Submit an Extend or End role request.....	48
Downloadable reports	49
Submit a payment enquiry.....	51
Submit a new payment enquiry.....	51
Submit a payment enquiry on a closed enquiry	56
View existing payment enquiries.....	59
Maximum display of 2000 Records on the Enquiries page.....	60

Changes from the last version

The following updates have been made to the last published version of my NDIS provider portal step by step guide.

As of February 2026:

- 'Submit a payment enquiry' section updated with a new status and screenshot. (Page 55)

Introduction

my NDIS provider portal is a new business system for providers.

This is a separate business system to the myplace provider portal where you currently – and will continue to – manage your transactions with NDIS, and view and manage your services with participants.

If you are a Specialist Disability Accommodation (SDA) provider, you will already be using my NDIS provider portal to manage your SDA enrolments.

Registered and unregistered Support Coordinators and Psychosocial Recovery Coaches will be the first to use the new Request for Service function in my NDIS provider portal.

Registered providers, Plan managers, Registered and unregistered Support Coordinators and Psychosocial Recovery Coaches will be able to view PACE approved participant's plans and budgets.

Gradually, additional myplace provider portal functionality will be introduced in my NDIS provider portal.

What can I do in my NDIS provider portal?

my NDIS provider portal currently offers functionality to:

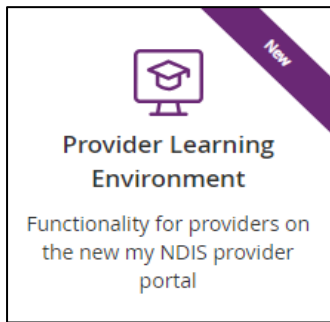
- Select and switch between active organisations,
- View broadcast messages
- View notifications
- Review, accept and decline Request for Service requests,
- View participant details,
- Review and submit your reporting requirement for Request for Service.
- View participant plan and budget, where a participant has given consent.
- View the Provider roles for participant
- Plan managers can request to add, extend and end a relationship with a participant
- View Organisation details
- Download reports
- View Employee details
- Extract key participant information in an excel report
- SDA providers can create and manage dwelling enrolments

Minimum browser requirements

To access my NDIS provider portal. Please use one of following browsers:

- Google Chrome
- Microsoft Edge
- Mozilla Firefox
- Safari on Mac OSX

Provider Learning Environment









We have released a learning environment to help you learn to use the new my NDIS provider portal. You can access the provider learning environment via this link <https://provider-portal-training.ndis.gov.au/>

The new learning environment includes walk-through tutorials. The tailored tutorials are available in the learning environment for different provider types and reflect the access providers have within my NDIS provider portal.

The tutorials have easy to follow steps to help you learn the processes and will be updated with new tutorials as functionality is added to my NDIS provider portal.

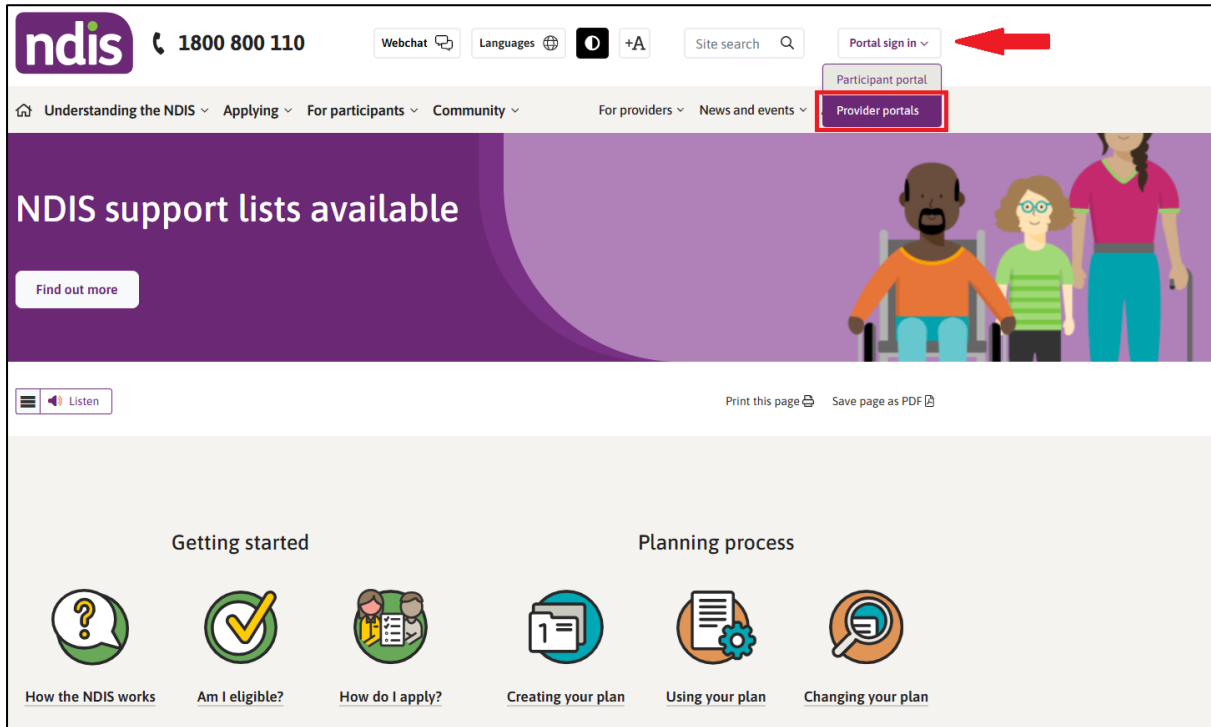
How to contact NDIS

Contact the NDIS by		
 <p>NDIS Live Webchat</p> <p>Webchat</p> <p>You can live chat with us about:</p> <ul style="list-style-type: none"> • my NDIS provider portal • Service bookings • Payment requests • Quotes • Referrals • Request for service • Searching for a registered provider 	 <p>Phone</p> <p>1300 311 675</p> <p>You can call us about:</p> <ul style="list-style-type: none"> • my NDIS provider portal • Service bookings • Payment requests • Quotes • Referrals • Request for service • Searching for a registered provider • Submitting a general enquiry, feedback, compliment, or a complaint 	 <p>Provider Portal Enquiry</p> <p>You can use the provider portal to:</p> <ul style="list-style-type: none"> • Submit a payment enquiry • Submit a general enquiry, feedback, compliment, or a complaint • Search for a provider • Upload documents
 <p>Email</p> <p>provider.support@ndis.gov.au</p> <p>You can email us about:</p> <ul style="list-style-type: none"> • Submit a general enquiry, feedback, compliment, or complaint • Email a document, form report or letter 	 <p>Contact & Feedback Form</p> <p>NDIS Online Form</p> <p>You can use the online form to:</p> <ul style="list-style-type: none"> • Submit a general enquiry, feedback, compliment, or a complaint • Request a call back 	 <p>Mail</p> <p>National Disability Insurance Agency PO Box 700 Canberra ACT 2601</p> <p>You can mail us to:</p> <ul style="list-style-type: none"> • Send a compliment, complaint or provide feedback, • Document, form, report or letter

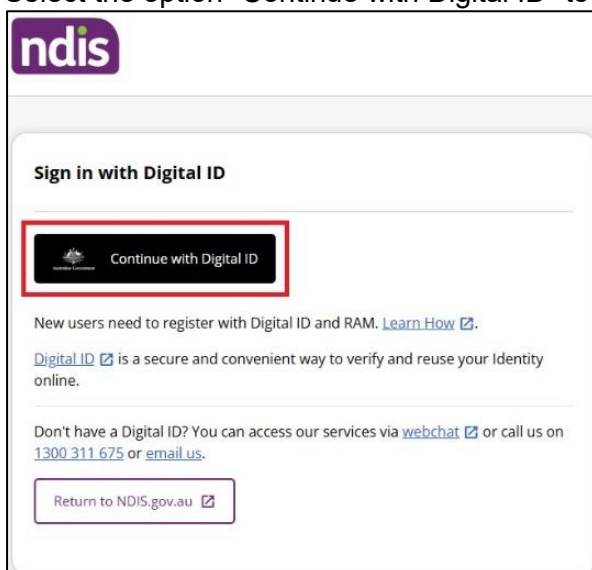
Access my NDIS provider portal

Users can access my NDIS provider portal from the link on the NDIS home page (www.ndis.gov.au).

1. Access **my NDIS** portal using the "Portal sign in" button on the [NDIS website](http://www.ndis.gov.au) and selecting "Provider portals" from the pop-up menu.



Select the option "Continue with Digital ID" to log in with your myID.



2. Sign in with Digital ID


- a. Select your identity provider to login using your myID.

Australia's Digital ID System

Select your identity provider

i You may need to [increase the strength of your digital ID](#) for NDIS - Provider Portal.

NDIS - Provider Portal needs you to prove who you are using a Digital ID.
Read about what is an [identity provider](#) and [your privacy and security](#).

 **myID**
Managed by Australian Government

You'll need these to get started

- iOS or Android device
- Remember my choice
(Not recommended for shared devices)

Select myID >

Cancel

- b. When you have selected myID, log in using your personal myID login details.

- c. Select the organisation from the 'Businesses I can act for' in RAM.

Note: If you are only authorized on behalf of one organisation, you will be automatically redirected to the NDIS provider portals selected screen as shown below.

Australian Government Relationship Authorisation Manager

Businesses I can act for

Select a business from the list to continue. If your business is not listed, you can [add a business](#).

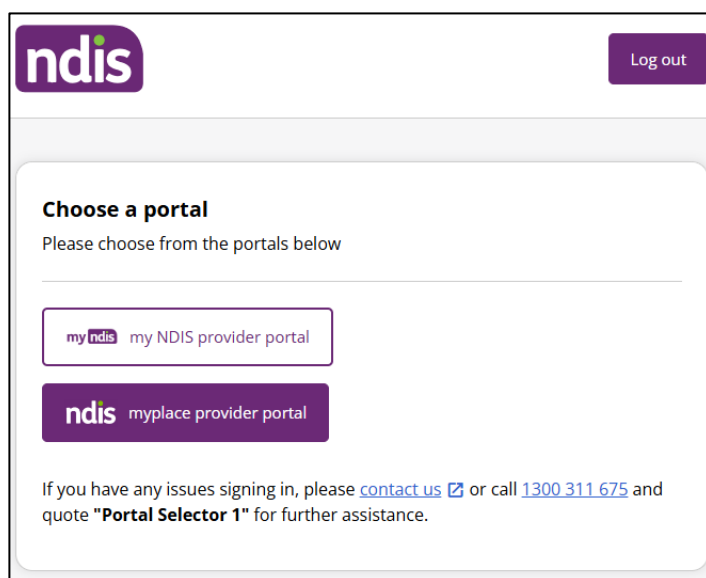
Search by ABN or name...

Entity name	ABN
<input type="radio"/> ADAMSON, KELLY	52 823 913 089
<input type="radio"/> DVGhaladown0100	22 626 779 349
<input type="radio"/> DVTestCo211	41 978 833 893
<input type="radio"/> INGREDA SA	15 488 201 297
<input type="radio"/> INGRIDVE LTD	85 030 164 471
<input checked="" type="radio"/> INFORMATION	18 029 979 811
<input type="radio"/> TEST_ABN	89 227 070 469
<input type="radio"/> Test_RAM_ABNH	89 234 288 100
<input type="radio"/> The Storecutlers	64 265 066 156
<input type="radio"/> WARD, DENNIS	20 548 328 432

Page 1 of 1 Results per page: 50

Cancel Continue

- d. If you are authorised to access the NDIS Provider Portals for one provider organisation only, or once you have chosen an organisation from the RAM ABN selection page, the NDIS Provider Portals landing page will load where you will see my NDIS provider portal tile.
3. Choose my NDIS provider portal tile on the landing page (N.B. my NDIS provider portal tile will not be available for State and Territory Public Trustee and Guardian staff. They will only be able to choose the myplace provider portal).



Set up your Digital ID and link to your business in RAM

If you do not have your myID set up, or you are not linked to a provider organisation in RAM, please refer to the [myID and RAM Step-by-Step Guide for NDIS Provider Portals](#) found on the [NDIS website](#).

Dashboard

A dashboard is located when you access my NDIS provider portal.

The dashboard will provide you with useful information at a quick glance on:

- Broadcast messages
- Notifications
- NDIS Quality and Safeguards Commission
- Need some help
- Quick links

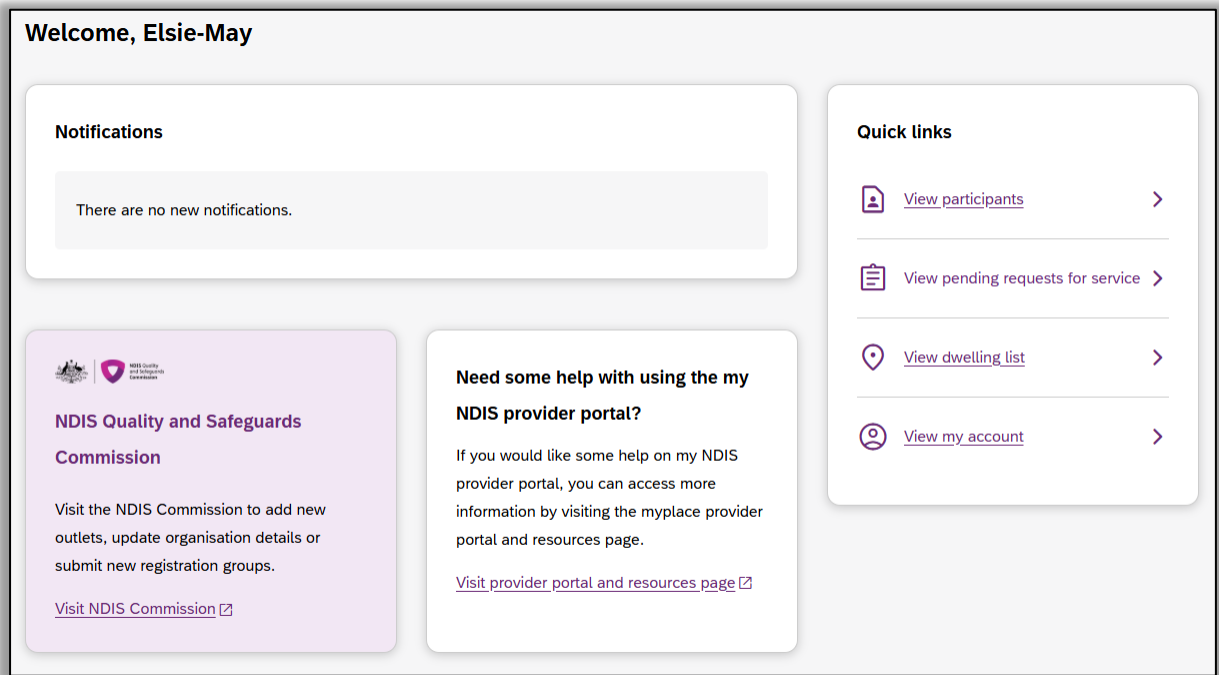


Figure 3 my NDIS provider portal dashboard page

Broadcast messages

A yellow banner will appear when scheduled maintenance to my NDIS provider portal is planned. The information displayed will be the date and time that the system will be unavailable.

Notifications

This card will display new notifications for:

- A new participant plan has been approved
- Changes have been made to your recorded my provider role
- Changes have been made to your recorded plan manager role.
- Changes have been made to your recorded support coordinator role.
- Changes have been made to your recorded recovery coach role.
- A new my provider role recorded.
- A new plan manager role recorded.
- A new support coordinator role recorded.
- A new recovery coach role recorded.
- A new request for service
- Changes have been made to the participant's existing plan

You can select the hyperlink of the notifications, and it will navigate you to the corresponding tab in my NDIS provider portal.

- The new request for service notifications will direct you to Request for Service Pending request tab
- All the other notifications will direct you to the Participants record

If you have no notifications, then a message will appear advising you that you have no notifications to display.

NDIS Quality and Safeguards Commission

This card has a hyperlink to the NDIS commission.

You can select the hyperlink to navigate to the NDIS Quality and Safeguards Commission to update your registration, organisation, and outlet details.

Need some help with using my NDIS provider?

This card has a hyperlink to the NDIS provider and portal resource page.

You can select the hyperlink to navigate to the NDIS provider and portal resource page to access my NDIS provider portal guide.

Quick links

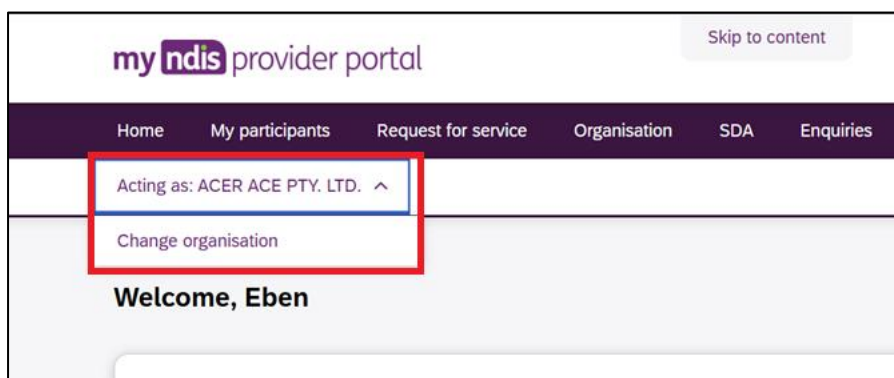
This card has hyperlinks to:

- View participants
- View pending requests for service
- View my account

You can select the hyperlinks to navigate to the to the corresponding tab in my NDIS provider portal.

Selecting an organisation

If you work on behalf of more than one provider organisation, you can switch between those organisations from my NDIS provider portal.

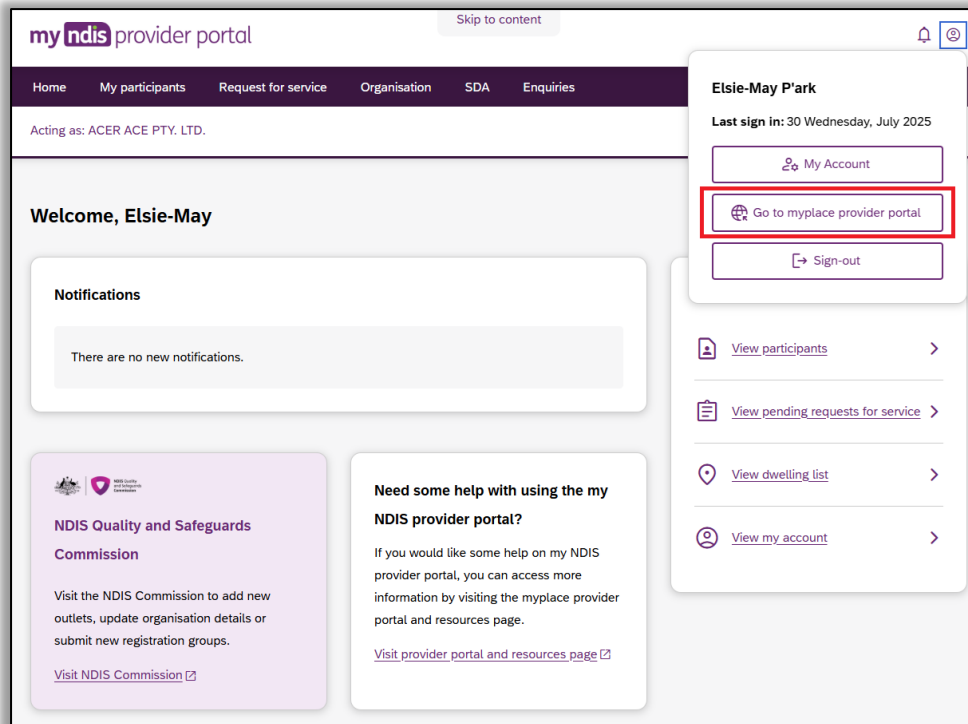


1. Click 'Acting As' dropdown button under top left of the navigation bar.
2. This action reveals another button labelled "Change Organisation".
3. Upon clicking this button, the user is redirected to Org/ABN selection screen in the same tab.
4. User selects the new Org/ABN.
5. Then the user is taken back to my NDIS provider portal dashboard for the new ABN in the same tab.

Switching Portals

Upon clicking the user profile icon in the top right of the navigation bar a drop-down menu appears that includes a button to navigate to myplace provider portal labelled 'Go to myplace provider portal'.

When the user clicks 'Go to myplace provider portal' button, a new tab opens with myplace provider portal dashboard page for the same ABN/organisation that is currently selected.



Notification Centre

A notification bell icon is located on the global navigation bar. This bell icon lets you know how many new notifications have been sent to your organisation today.

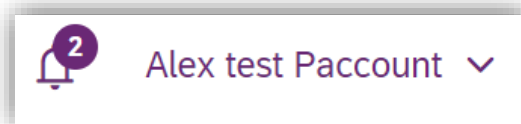


Figure 6 Bell icon for notifications

When you click on the bell notification the Notification Centre will display.

You will be able to view the new notifications for:

- A new participant plan has been approved
- Changes have been made to your recorded my provider role
- Changes have been made to your recorded plan manager role.
- Changes have been made to your recorded support coordinator role.
- Changes have been made to your recorded recovery coach role.
- A new my provider role recorded.
- A new plan manager role recorded.
- A new support coordinator role recorded.
- A new recovery coach role recorded.
- A new request for service
- Changes have been made to the participant's existing plan

Notification centre

Notifications will expire from your list in 30 days.

Notifications Filters

Notification subject	Category	Date received
You have a new my provider role recorded.	Participant Relationship - New	07/02/2024
Changes have been made to your recorded my provider role.	Participant Relationship - Update	07/02/2024
Changes have been made to your recorded plan manager role.	Participant Relationship - Update	07/02/2024
Changes have been made to your recorded my provider role.	Participant Relationship - Update	13/02/2024
Changes have been made to your recorded plan manager role.	Participant Relationship - Update	13/02/2024

Showing 1 — 5 of 20 notifications Notifications per page

< First
1
2
3
4
Last >

5
10
20
50

Figure 7 Notification centre

The encircled number beside the bell notification and the Notification centre page shows the number of notifications that you have received today.

my NDIS provider portal navigation

Depending on your organisation's role you will see several tabs in my NDIS provider portal.

Home: allows you to navigate back to the dashboard

[My participants](#): allows you to search for a participant associated with your organisation and view certain details about them and their plan.

[Requests for service](#): allows you to manage requests for service, respond to requests and submit reports for requests.

[Organisation](#): allows providers to view information about your Organisation, Employees, and Relationships requests.

SDA: allows providers to manage Specialist Disability Accommodation (SDA) dwelling enrolments.

Note

Instructions for using the SDA functions in my NDIS provider portal are provided in a separate guide: [my NDIS provider portal: Specialist Disability Accommodation \(SDA\) Dwelling Enrolment \(Step-by-step guide\)](#).

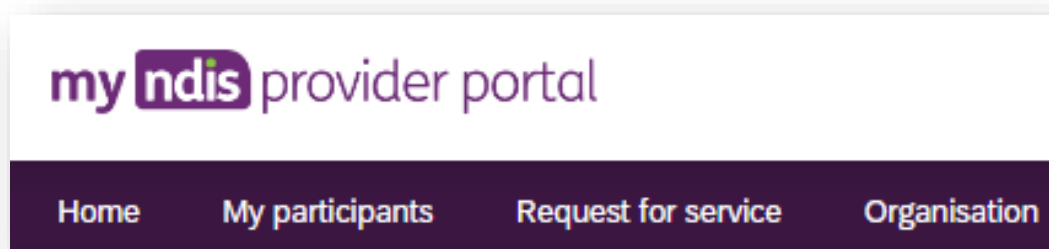


Figure 8 my NDIS provider portal navigation tabs

My Participants

The Participant relationship list allows you to search for a participant and view their plan when the participant has 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.

In addition, you can view other information, including:

- NDIS number,
- Participant name
- Location
- Role
- Role start date
- Role end date
- Status

Note: The role column will state the role that you have with the participant. Roles can be my provider, plan manager, support coordinator or recovery coach. A participant may appear in the list more than once if you have multiple roles with them.

If a participant relationship started within the past 29 days AND is due to end within the next 29 days, the participant relationship will show the status of "Ending soon" by default. However, if the table is sorted manually by "Role start date", those participant relationships will be displayed with status "New" and if the table is sorted by "Role end date", they will be displayed with status "Ending soon". Similarly, the same relationship will also appear in the filtered list when a 'Status' filter is applied. This means a participants could have either a 'New status' or an 'Ending soon status', under this circumstance.

Table 1 Role status

Participant status	Definition
New	Role started within the last 29 days.
Ending soon	Role ends within the next 29 days

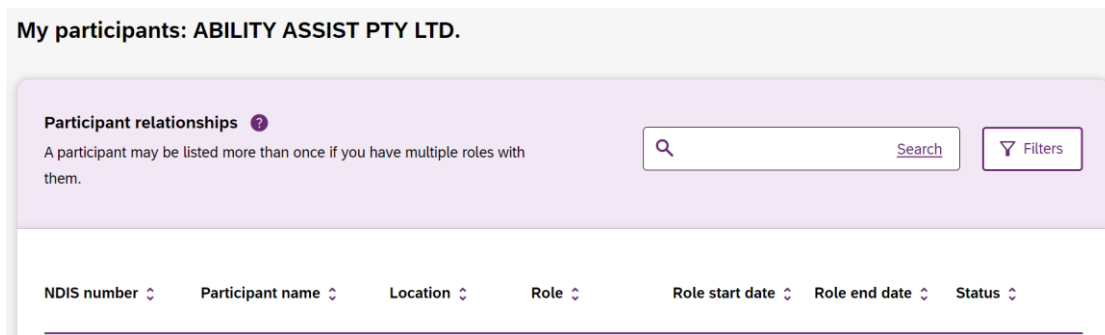


Figure 9 Participant List

Counter for New Participants

A counter will display next to organisation name that will show how many participants your organisation has with the status of 'New'.

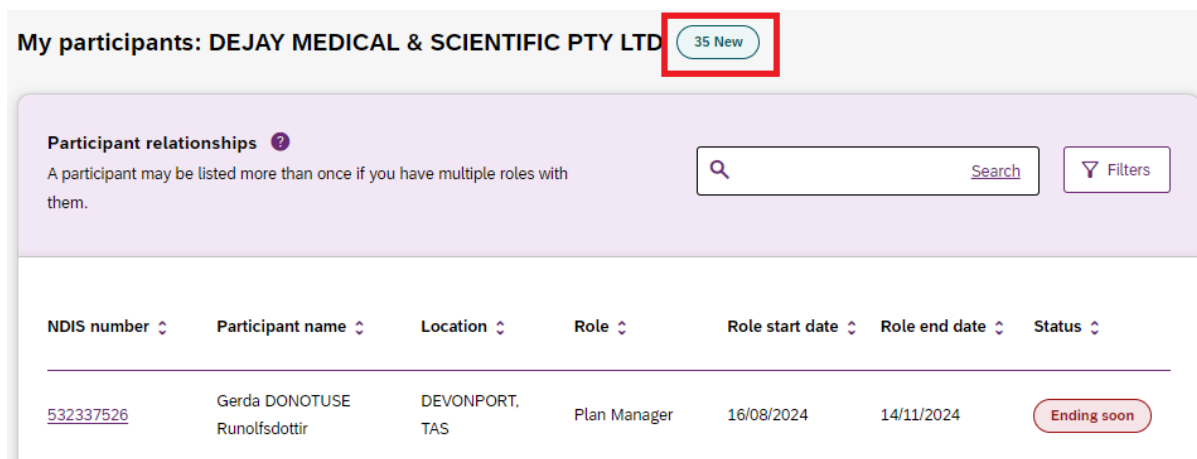


Figure 10 Counter for New Participants

Maximum display of 2000 records on the My participant's page

This list will display a maximum of 2,000 records. The below error message will appear if this limit is exceeded. To view the remaining records, use the search and filter tools.

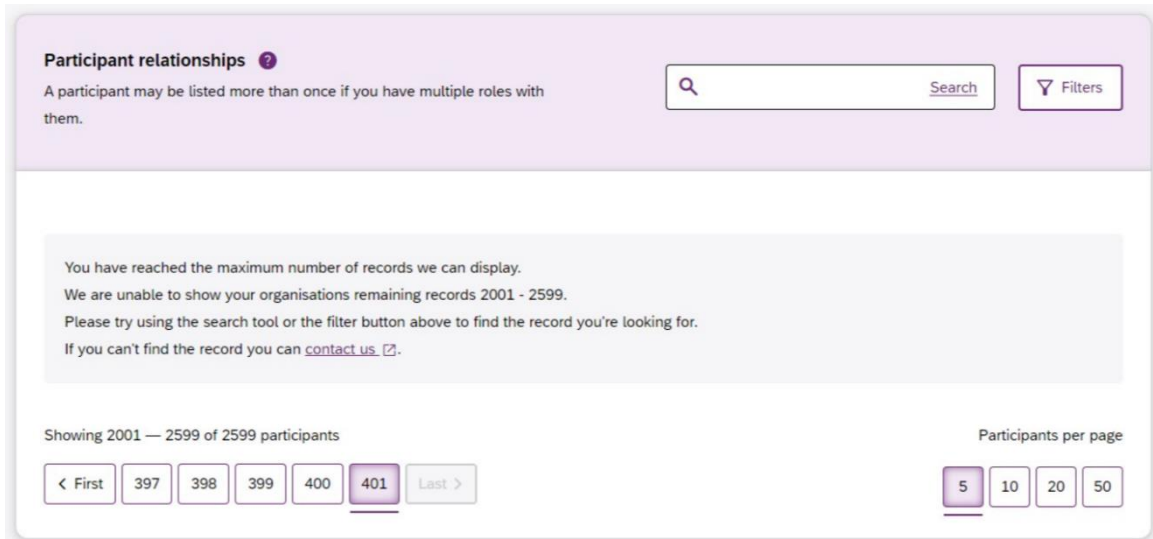


Figure 11 My participants page, 2000 records display error message

Sorting the participant relationships table

By default, all Participant relationships will be sorted in the ascending order of the 'Role end date'. This will display Participant relationships with status 'Ending soon' at the top of the list followed by those with either the status of 'New' or no status.

When there are multiple records with the same Role end date, the records will be displayed in the alphabetical order of participants first name, ascending (A-Z).

Columns with an up-down chevron can be sorted in ascending and descending order by clicking the column headings.

Manual sorting of 'Status' column displays participant relationships sorted in descending order of the 'Role start date'. This will display participant relationships with the status 'New' at the top of the list followed by those with either the status of 'Ending soon' or no status.

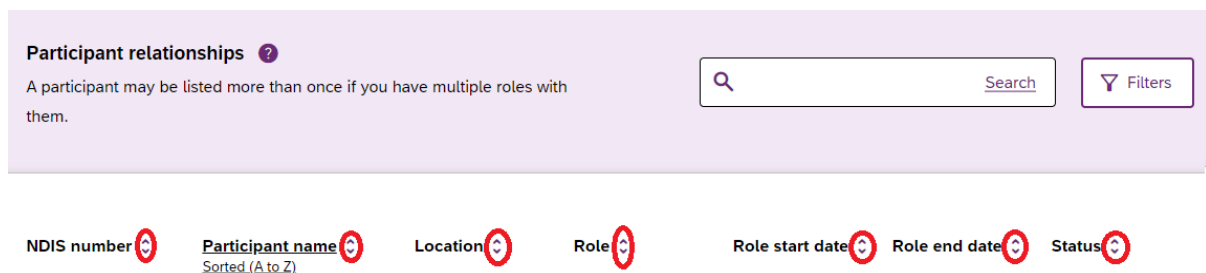


Figure 12 Sortable columns on My participants page

Search for and select a participant

To search for a participant:

1. Select the **My Participants** tab

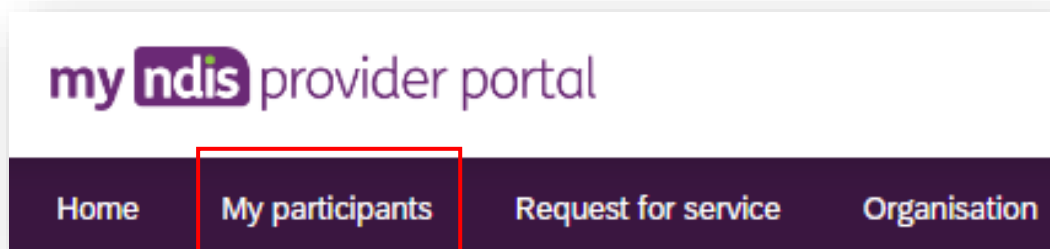


Figure 13 My Participants tab

2. A list of your active participants will be displayed.

My participants: DEJAY MEDICAL & SCIENTIFIC PTY LTD.

Participant relationships ?
 A participant may be listed more than once if you have multiple roles with them.

Search Filters

NDIS number	Participant name	Location	Role	Role start date	Role end date	Status
532343592	Anderson PortalTesting Schowalter	KEILOR EAST, VIC	my provider	13/09/2024	25/10/2024	Ending soon
532337526	Gerda DONOTUSE Runolfsdottir	DEVONPORT, TAS	Plan Manager	16/08/2024	14/11/2024	Ending soon
532337526	Gerda DONOTUSE Runolfsdottir	DEVONPORT, TAS	my provider	16/08/2024	14/11/2024	Ending soon
532344097	Colton Bergnaum	DEVONPORT, TAS	my provider	25/08/2024	16/11/2024	Ending soon
532361199	Adrien Haag	DEVONPORT, TAS	Plan Manager	26/08/2024	29/11/2024	

Showing 1 — 5 of 66 participants Participants per page

< First **1** 2 3 4 5 Last > 5 10 20 50

Figure 14 Participants relationships page

3. To search for a participant, enter the participant NDIS number (for best results), or enter the participant's name in the search box and click **Search**.
4. To filter your list. Click on the Filters button. You can filter by choosing the Location, Role, Role start date, Role end date and/or Status and click Apply filters.

Participant relationships ?

A participant may be listed more than once if you have multiple roles with them.

Filters

Location

Role

Role start date
(dd/mm/yyyy)

Role end date
(dd/mm/yyyy)

Status

Figure 15 Participant Search Box and Filter options

5. To view the participant's plan, click on their **NDIS number**.

My participants: DEJAY MEDICAL & SCIENTIFIC PTY LTD.

Participant relationships ?

A participant may be listed more than once if you have multiple roles with them.

NDIS number	Participant name	Location	Role	Role start date	Role end date	Status
532343592	Anderson PortalTesting Schowalter	KEILOR EAST, VIC	my provider	13/09/2024	25/10/2024	Ending soon
532337526	Gerda DONOTUSE Runolfsdottir	DEVONPORT, TAS	Plan Manager	16/08/2024	14/11/2024	Ending soon
532337526	Gerda DONOTUSE Runolfsdottir	DEVONPORT, TAS	my provider	16/08/2024	14/11/2024	Ending soon
532344097	Colton Bergnaum	DEVONPORT, TAS	my provider	25/08/2024	16/11/2024	Ending soon
532361199	Adrien Haag	DEVONPORT, TAS	Plan Manager	26/08/2024	29/11/2024	Ending soon

Showing 1 — 5 of 66 participants

Participants per page

< First **1** 2 3 4 5 Last >

5 10 20 50

Figure 16 My participants home tab, showing links to the participant details page

View participant details

The Participant plan page shows the participant's basic details, including their name, NDIS number, date of birth and contact details.

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.

Steven Michael Jacobs (437582937)
Duration: 10th July 2021 to 10th July 2022

Basic details						
Preferred name	Date of birth	Gender	Preferred contact method	Contact phone	Contact email	Interpreter
Steven	18/01/1966	Male	Email	0444 444 444	steve.mj@email.com	Not required

Figure 17 My Participants page showing basic details

Depending on your organisation's registration the information which is displayed will vary. The following sections may be available:

- About me
- Goals
- Budget
- Funded Supports
- Informal community and mainstream support, and
- Participant nominee details.

To open each section, click on the relative tab.

Note: Due to the recent Section 33 Legislative Changes, the information seen within the Budget and Funded supports tab is dependent on whether the current approved plan includes funding periods or not. More information can be found on the [Frequently asked questions about legislation | NDIS](#) website.

About Me

The About me section shows details about the participant's daily life, living arrangements and strengths.

This section is only displayed when a participant has given consent to the support coordinator or psychosocial recovery coaches to view their plan.

Goals

The Goals section outlines a participant's goals and how they will reach them.

This section is only displayed when a participant has consented to you to view their goals.

By selecting “View goals history” a provider can view a participant’s past goals. A goal appears in this list when a participant informs NDIA that they no longer working towards a goal.

The goals history is only visible when a participant has allowed you to view their past goals, and you are either a support coordinator, psychosocial recovery coach or a plan manager.

Note: My provider role is unable to view past goals.

Budget

The budget tab shows details about participant’s live budget on the day of accessing the budget tab. This will include the amounts funded, spent, and remaining for claimable supports included in the participant’s plan.

By selecting ‘View budget history’ a provider may view a list of previous budgets and their dates. Selecting a previous budget from this list will display the details of funding for that budget period.

The budget history is only visible when a participant has consented for you to view their past budgets.

Note: When you have been given consent to view a participant current/historical plan and you are:

- Support coordinators or psychosocial recovery coaches you may view all budget details.
- Plan managers you can only view the plan managed budget details and whether the budget is available or exhausted for self-managed and agency managed budgets.
- As my provider budget details are not available.

Plans without Funding Periods

The Budget section may include details of each category of funds included in a participant’s plan, including:

- Core flexible: Self-managed funds
- Core flexible: Registered plan managed
- Core flexible: Agency managed
- Stated supports
- Recurring payments

Plans with Funding Periods

The Budget section includes a ‘Total funding amount’ accordion that describes how the participant’s total funding amount is calculated.

This accordion lists a breakdown of all the available funding components and their corresponding funding amounts that are included in the participant's plan.

Total funding amount	
\$45,000.00	
<p>^ How is the participant's total funding amount calculated?</p> <p>The individual funding component amounts combine to create the total funding amount.</p>	
Funding component	Funding amount
Core flexible (Self-managed)	\$25,000.00
Core flexible (Plan-managed)	\$4,000.00
Core flexible (Agency-managed)	\$2,000.00
Improved daily living skills	\$9,000.00
Choice and control	\$2,000.00
Assistive technology maintenance, repairs and trials	\$1,000.00
Recurring supports	\$2,000.00
Total funding amount	\$45,000.00

Figure 18 'Total funding amount' accordion expanded view displaying information on funding components and their corresponding funding amount allocated to a participant's plan that has funding periods. This image represents a Support co-ordinator/Recovery coach view.

The Budget section may include details of each funding component in a participant's plan, including:

- Core Flexible (Self-managed)
- Core Flexible (Plan-managed)
- Core Flexible (Agency-managed)
- Stated supports
- Recurring Transport

For each funding component included within the plan, you will be able to see:

- **Support Category** – Name of the support category included in the funding component.
- **Management Type** – The fund management type for the funding component.
- **Released** - The total amount of funds made available for spending from the funding periods lapsed in the participant's plan.
- **Spent** - The total amount of funds spent across the funding periods lapsed in the participant's plan.
- **Available** - The total amount of funds available for the participant to spend during the current funding period. This amount includes any unspent funds

from previous funding periods in the same plan alongside any funds released for the current funding period.

- **Actions** – The below are available under the Action column.
 - **Funding period schedule** – Displays a schedule of funding periods assigned to a funding component.
 - **Support detail** – Displays the base support description of the support category along with any additional comments relevant to this category.

Core Flexible (Self-managed) ?

Participants self-manage these funded supports and have flexibility. The total funded amount for flexible core is made up of the following supports.

Support category	Management type	Released	Spent	Available	Actions
Assistance with social, economic and community participation	Self-managed	\$7,500.00	\$1,923.44	\$5,576.56	More ▾
Assistance with daily life	Self-managed	\$5,000.00	\$9,120.00	-\$4,120.00	More ▾
Total		\$12,500.00	\$11,043.44	\$1,456.56	

Figure 19 Funding component card displaying information on supports included in a participant's plan that has funding periods. This image represents a Support co-ordinator/Recovery coach view.

Core Flexible (Self-managed) ?

Participants self-manage these funded supports and have flexibility. The total funded amount for flexible core is made up of the following supports.

Support category	Management type	Released	Spent	Available	Actions
Assistance with social, economic and community participation	Self-managed	\$7,500.00	\$1,923.44	\$5,576.56	More ▾
Assistance with daily life	Self-managed	\$5,000.00	\$9,120.00	-\$4,120.00	<div style="border: 1px solid black; padding: 2px;"> Funding period schedule Support detail </div>
Total		\$12,500.00	\$11,043.44	\$1,456.56	

Figure 20 Funding component card displaying information on options of Funding period schedule and Support detail in a participant's plan that has funding periods. This image represents a Support co-ordinator/Recovery coach view.

When you have the consent to view budget figures for a funding component, the Actions column will be displayed next to the Available column.

Clicking the 'More' button will bring up two options - 'Funding period schedule' and 'Support detail'.

Clicking on the 'Funding period schedule' option will bring up a Funding period schedule pop up modal, which will display the following information for the funding component:

- **Funding period** - Displays the start and end date of a funding period.
- **Length** – Displays the length of the funding period. This will usually be 1, 3, 6, or 12 months.
 - **Note:** If a support category is added to a funding component after the plan is approved, you will see 'Unavailable' in the length column.
 - For example, once a plan is approved, if a support category (other than core flexible supports) is added to a plan through a variation, the funding period for the newly added support category will not match the other funding periods in the plan. Therefore, the new support category funding period length will display as 'Unavailable'.
 - For core flexible supports, the display of 'Unavailable' would only occur when the entire core flexible component (of a single management type) is added to a plan after the plan is approved.
- **Funding period amount** - Displays funds allocated to any given funding period.
- **Released** - Displays 'Yes' or 'Not yet released' respectively for funds having been released for a given funding period or not.

Core Flexible (Plan-managed) funding period schedule

The Funding period amount, includes all of the support categories within this funding component.
Any unspent funding will roll-over to the next funding period.

12 funding periods

Funding period	Length	Funding period amount	Released
18 Aug 2025 to 17 Nov 2025 (current)	3 months	\$250.00	Yes
18 Nov 2025 to 17 Feb 2026	3 months	\$250.00	Not yet released
18 Feb 2026 to 17 May 2026	3 months	\$250.00	Not yet released
18 May 2026 to 17 Aug 2026	3 months	\$250.00	Not yet released
18 Aug 2026 to 17 Nov 2026	3 months	\$250.00	Not yet released

Close

Figure 21 Funding period schedule pop-up displaying information on funding periods assigned to a specific funding component. This image represents a Support co-ordinator/Recovery coach view.



Core Flexible (Plan-managed) funding period schedule

The Funding period amount, includes all of the support categories within this funding component.
Any unspent funding will roll-over to the next funding period.

This support category was added to the participant's plan on 15 August 2025. It is important to note that the duration of the first funding period may be less than other funding periods. Always refer to the funding period start and end dates.

12 funding periods

Funding period	Length	Funding period amount	Released
15 Aug 2025 to 11 Nov 2025 (current)	Unavailable	\$692.20	Yes
12 Nov 2025 to 11 Feb 2026	3 months	\$709.80	Not yet released
12 Feb 2026 to 11 May 2026	3 months	\$709.80	Not yet released

Close

Figure 22 Funding period schedule modal displaying information for a funding component. This example has a support that was added after the plan approval therefore the length is 'unavailable'.

Clicking on 'Support detail' option will bring up a Support detail pop up modal to display the following information for the support category:

- **Support detail header** - Displays the name of the Funding component or support category.
- **Support category name** – Displays the name of all the support categories within the funding component in a expand-collapse modal.
- **Support detail information** – Displays the base support category description of each of the supports within the funding component along with all the plan comments available for the support separated by two-line breaks.

Core Flexible (Self-managed) support detail

^ Assistance with Daily Life

Supports to assist or supervise you with your personal tasks during day-to-day life that enable you to live as independently as possible. These supports can be provided individually in a range of environments, including your own home.

Specialist home-based assistance for a child Support to work with your informal supports (like family and carers) to meet your needs.

^ Assistance with Social, Economic and Community Participation

Close

Figure 23 Support detail pop-up displaying the base support category description of the corresponding Support category included the funding component. This image represents a Support co-ordinator/Recovery coach view.

Funded Supports

The funded supports outline all the supports that are funded in a current plan, at the time of plan approval, that is, the budget information is not live and therefore does not include information on funds spent and funds remaining. Live budget details are available in the Budget tab.

By selecting 'View funded supports history' a provider may view a list of changes to a participant's funded supports. Selecting a change reason (participant's previous plan) from this list will display the details of funded supports at that point in time.

The funded supports history is only visible when a participant has given consent for you to view their funded supports history.

Note: When you have been given consent to view a participant current/historical funded support and you are:

- Support coordinators or psychosocial recovery coaches you may view all funded support details
- Plan managers can only view the plan managed funded supports details
- As my provider funded supports details are not available.

Note: We are aware indexation is not displayed in the historical funded supports pages. Please refer to the 'Budget' tab for budget amounts including indexation.

Plans without Funding Periods

The Funded supports section shows total funded supports for each support category, and details of the funding available in each category.

Plans with Funding Periods

The Funded supports section includes a 'Total funding amount' accordion that describes how the participant's total funding amount is calculated.

This accordion lists a breakdown of all the available funding components and their corresponding funding amounts that are included in the participant's plan.

Total funding amount (Plan-managed)
\$45,000.00

How is the participant's total plan-managed amount calculated?
The individual plan-managed funding component amounts combine to create the total plan-managed amount.

The total amount for each funding component will be made available to participants in specific time intervals called funding periods. Each funding component has its own funding periods.

Funding component	Funding amount
Core flexible (Plan-managed)	\$4,000.00
Improved daily living skills	\$9,000.00
Total funding amount (Plan-managed)	\$13,000.00

Figure 24 'Total funding amount (Plan-managed) accordion expanded view displaying information on funding components and their corresponding funding amount allocated to a participant's plan that has funding periods. This image represents a Plan manager view.

The Funded supports section shows the total funding amount – the total amount for all reasonable and necessary supports funded in the participant's plan.

Each funding component section is displayed in an accordion view which has both collapsible view and expanded view.

Within each collapsible view of a funding component, you will be able to see a summary of the funds allocated to it, that includes:

- **Funding component name** – Name of the funding component.
- **Budget type** – The budget type of the funding component. E.g., Flexible or stated.
- **Management type** – The fund management type for the funding component. E.g., Self-managed, Plan-managed or Agency-managed.
- **Funding amount** – Total amount allocated to the funding component.

Within each expanded view of a funding component, you will be able to see a detailed view of its funding period schedule and support details that includes:

- **Support details** section – Displays the support category description and relevant comments around support items funded under the support category.

- **Funding period schedule** section - Displays a schedule of funding periods assigned to a funding component. It includes the below details:
 - **Displays total number** - of funding periods for the funding component.
 - **Funding period** - Displays the start and end date of a funding period.
 - **Length** – Displays the length of the funding period. This will usually be 1, 3, 6, or 12 months.
 - **Note:** If a support category is added to a funding component after the plan is approved, you will see 'Unavailable' in the length column.
 - **Funding period amount** - Displays funds allocated to any given funding period.
 - **Total** – Displays the sum of all the funding period amount within the funding component.

Funding component:
Funding component amount:

^ Core Flexible (Plan-managed)
\$1,023.52

This funding component is:
Flexible
and
Plan-managed

Support details

This funding can be used for the following supports:

^ Transport

Supports to allow you to pay a provider to transport you to an activity that is not itself a support – or to a support that is delivered by another provider. This enables you to travel to and from appointments or your place of work.

Specialised transport Specialised transport services to help you get to [work/ study/community activities].

Funding period schedule

The Funding period amount, includes all of the support categories within this funding component. Any unspent funding will roll-over to the next funding period.

12 funding periods

Funding period	Length	Funding period amount
11 Jun 2025 to 10 Sep 2025 (current)	3 months	\$85.33
11 Sep 2025 to 10 Dec 2025	3 months	\$85.29
11 Dec 2025 to 10 Mar 2026	3 months	\$85.29
11 Mar 2026 to 10 Jun 2026	3 months	\$85.29

Figure 25 Funding component accordion within the Funded Support tab, showing information for the Core Flexible (Plan-managed) funding component

Informal community and mainstream support

The informal community and mainstream support section shows information around current support and new support for a participant. There are lists for the participant's current supports and new support.

This section is only displayed when a participant has given consent to the Support Coordinator or Psychosocial Recovery Coach to view their plan.

Participant nominee details

The participant nominee detail section shows details for each nominee, the relationship type for a participant and contact details.

This section is displayed for all providers.

Provider roles

The provider roles section shows the role or roles that you have been assigned in the participant's plan.

The Provider roles' section displays a Support category details column.

It allows providers to see when they have been recorded as my provider for the delivery of specialist disability accommodation, home and living supports and/or behaviour supports in my NDIS provider portal.

If a provider is not recorded at the category level the new column will display 'Not applicable'.

The portal will individually list each time a provider is recorded as a category level my provider.

Provider role	Support category	Last modified date	Role start date	Role end date	Status	Actions
Support Coordinator	Not applicable	09/08/2024	09/08/2024		New	
Recovery Coach	Not applicable	14/08/2024	14/08/2024		New	
Plan Manager	Not applicable	14/08/2024	09/08/2024	31/12/2025	New	More
my provider	Not applicable	14/08/2024	09/08/2024	31/12/2025	New	More
my provider	Behaviour Support	14/08/2024	14/08/2024	31/12/2025	New	More
my provider	Home and Living	14/08/2024	14/08/2024	31/12/2025	New	More

Showing 1 — 6 of 6 roles

Roles per page: 5, 10, 20

Figure 26 My Participants page showing links to sections with further information

Extend or End provider roles

If you are a plan manager or my provider, you will see the 'More' Button in the Actions column.

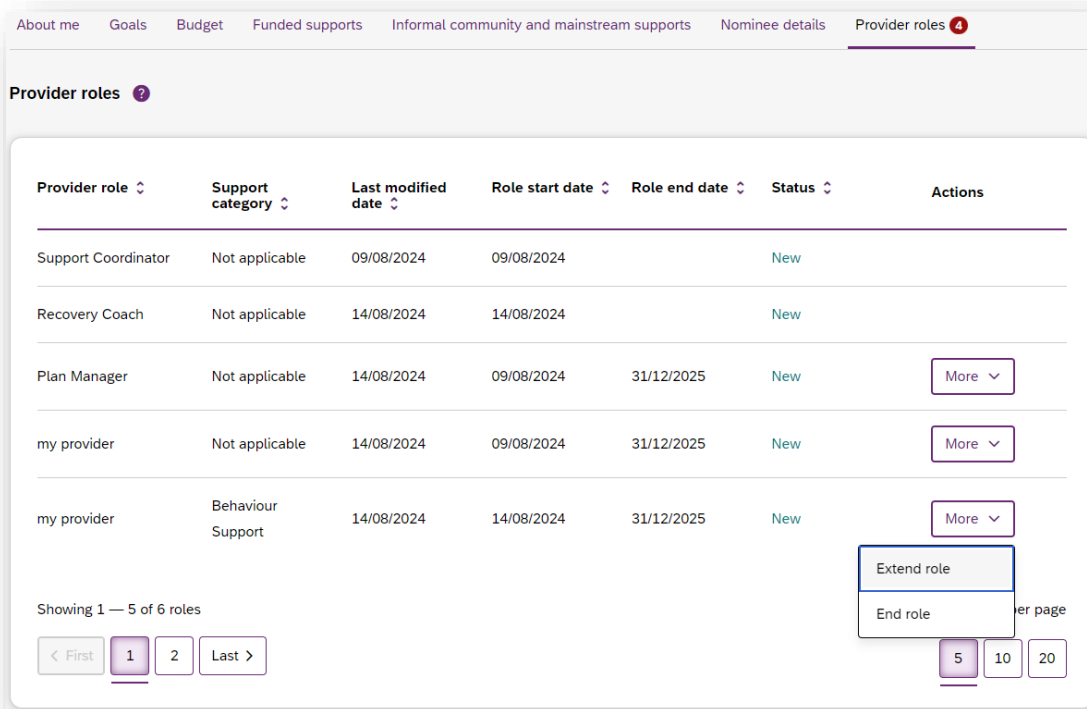


Figure 27 My Participants page showing links to Extend role and End role buttons

Clicking the **More** button will display two additional buttons – **Extend role** and **End role** - that allow you to request an extension to or end the selected provider role.

The **Extend current role** button will only appear if the relationship is not ongoing, i.e. it has an end date. You must choose the type of extension you want, an ongoing relationship or one that has an end date.

The **End current role** button allows you to end a current relationship with the participant.

Note: Requests to end my provider role earlier than previously recorded will not update my provider role end date if this role exists alongside the plan managers or my provider support category roles.

This is because my provider role needs to exist until the last day of the plan manager or my provider support category role, or both.

When ending my provider role with the participant, first you will need to end the plan manager or my provider support category role, or both, then end the my provider role, with the same end date.

Request for Service

The Request for service tab allows you to manage requests for service, respond to requests and submit reports for requests.

View Support Coordination Requests for Service

To view Support Coordination Requests for Service submitted to your organisation:

1. Select the Request for service tab.

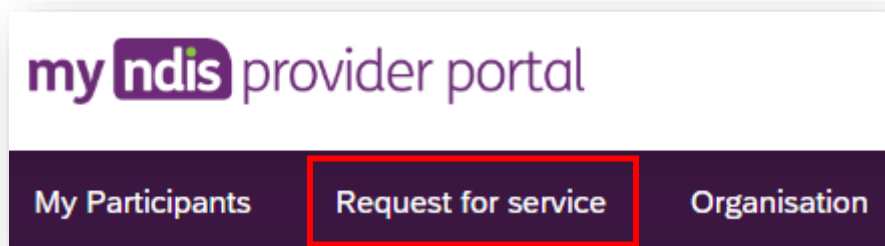


Figure 28 Request for service tab

2. This will display the **Request for service page**, and links for sections for:

Pending requests: view any pending requests for support coordination services sent to your provider organisation by the Agency. Allows you to review a pending request and either accept or reject the request.

Accepted Requests: view any previously accepted requests for service.

You can now search by:

- Request ID
- NDIS number
- Participant last name

Reporting Tasks: view and complete reporting tasks associated with requests.

Request History: view a history of requests.

You can Search by:

- Request ID (A guide text is displayed next to the search box, see figure below)

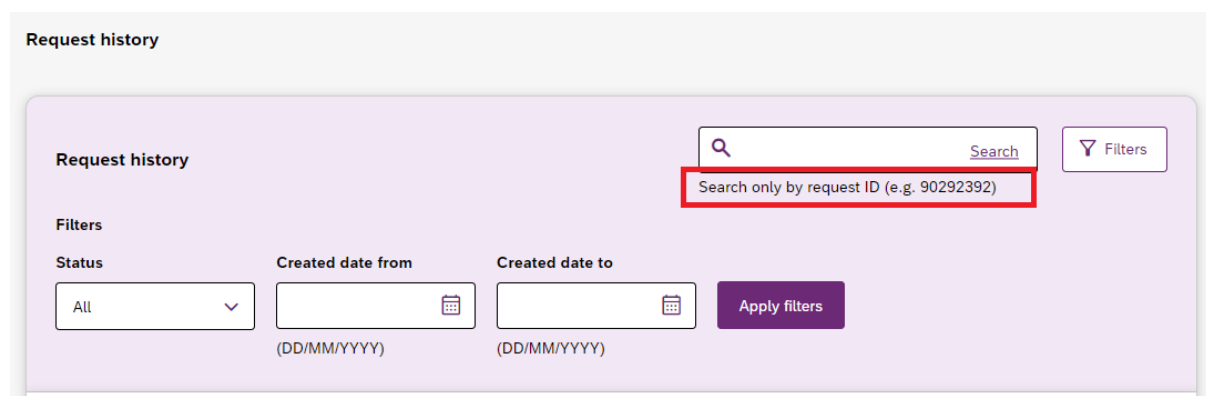


Figure 29 Request history page, Search box

Note:

- Input a minimum of 3 numbers in the search box to retrieve the required results. System will display an error message for anything less than 3 numbers in the search box.
- Default sorting of the columns is in descending order of Request ID.
- Sorting by age or status will display list in that order, however if there are more than one participant with same age or status a secondary sorting will be applied, which will display the participants in ascending order of their first name.

You can Filter by:

- Status
- Date From
- Date to

Maximum display of 2000 Requests on the Request history page

This list will display a maximum of 2,000 records. The below error message will appear if this limit is exceeded. To view the remaining records, use the search and filter tools.

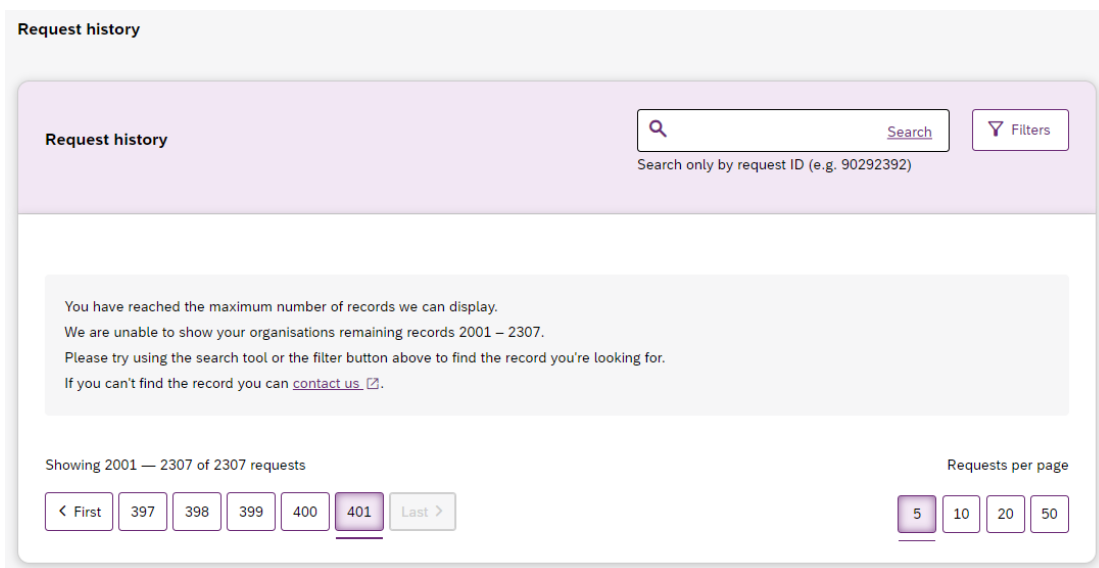


Figure 30 Request history page, 2000 requests display error message

The encircled number beside **Pending requests** link shows the number of outstanding, pending requests for service for your organisation.

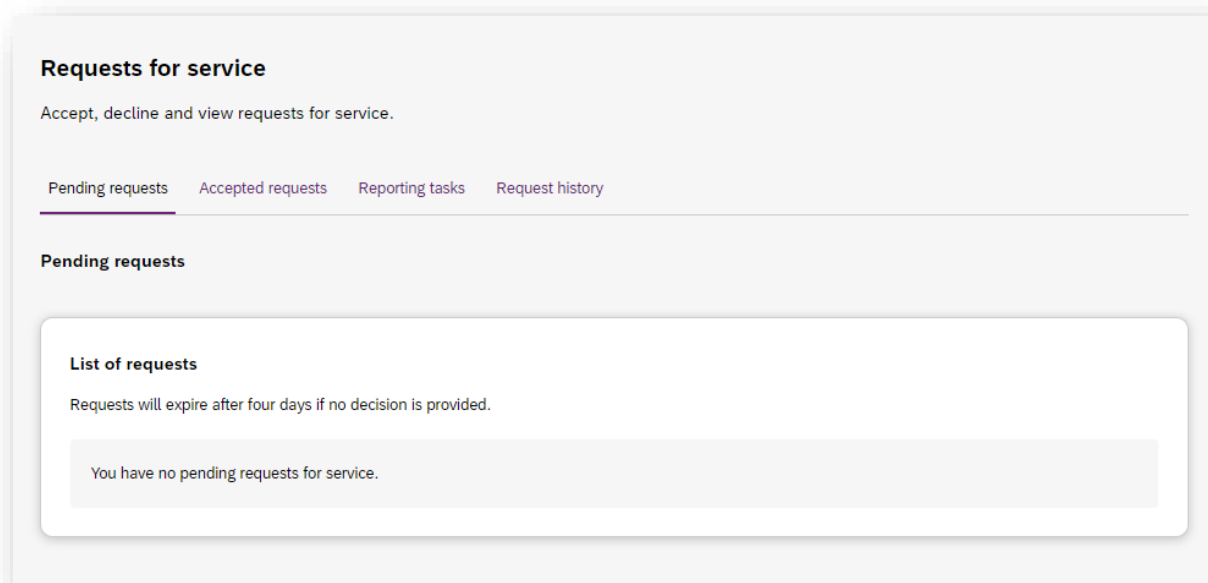


Figure 31 Requests for service page, showing links to sections

3. The **Pending requests** section will display a list of pending requests for service for your organisation. The following details are included for each request:

Request ID: A unique ID for each request.

Age: The participant's current age.

Location: The participant's suburb.

Disability: The main disability experienced by the participant.

Decision due: The due date for a response to the request.

Note: All RFS's need to be accepted/declined within 5days from when its received. Any request which isn't actioned within this time will expire automatically. A new RFS will need to be submitted to establish the relationship.

This list can be sorted by column, toggle between ascending and descending sort-order by clicking the column heading.

4. To review the details of a pending request, click the link under the Request ID column.

List of requests

Requests will expire after four days if no decision is provided.

Request ID ↕	Age ↕	Location ↕
12345678	30	Kellyville, NSW
12345676	16	Castle Hill, NSW

Figure 32 Opening a request for service

5. The **Review pending request page** shows some additional details:

Basic details: including the support budget and NDIS contact, as well as limited, anonymised details about the participant.

About Participant: further details about the participant’s disability and whether they require an interpreter.

Additional information section shows further detail about the support being requested.

Review pending request

Decision due Friday 12th May 2022

Basic details

Request ID	Participant name	Age	Location	Support budget	NDIS contact
12039845	Name withheld	30	Kellyville, NSW	\$16,700 over 24 months	enquiries@ndis.gov.au

About participant

Disability information
E88 - Other metabolic disorders

Interpreter required
Not required

Additional information

Purpose of referral
Support coordination

Type of funded request
Support connection

Participant context

Figure 33 Review pending request page, showing request details.

Respond to a Request for service

Once you have reviewed the information and decided you may either accept or decline a request for service before the decision due date.

Note: Any request which isn't actioned before the decision due date will expire automatically. A new RFS will need to be submitted to establish the relationship.

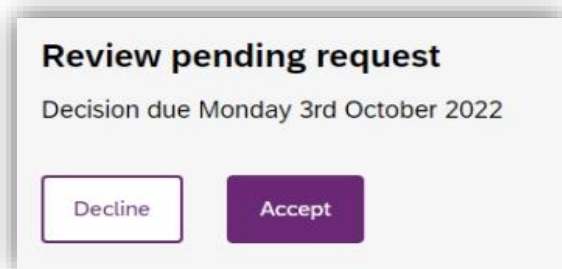


Figure 34 Decline and accept request buttons

To Accept

1. To accept the **Pending request**, click the **Accept** button near the top of the page.
2. You will be prompted to confirm that you have read all the available information, click the **Accept request** to do so.
3. Your acceptance will be confirmed in a banner displayed across the top of the page.

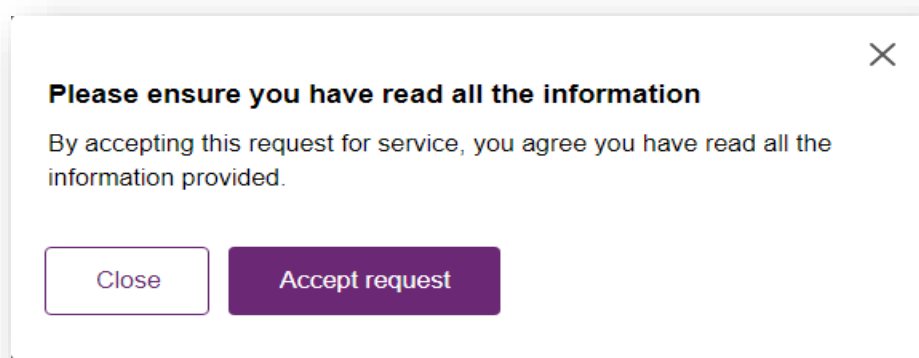


Figure 35 Prompt to confirm acceptance of a request for service.

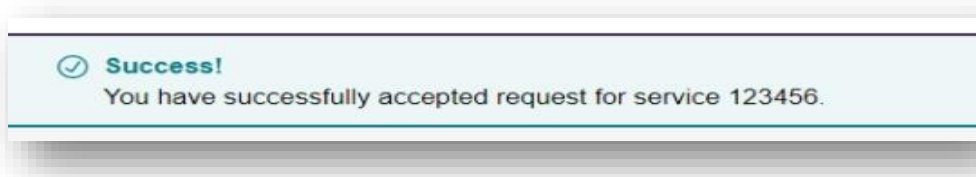


Figure 36 Confirmation of successfully accepting of a request for service

To Decline

4. To decline the **Pending request**, click the **Decline** button near the top of the page.
5. You will be prompted to provide a reason for declining the request for service

A dialog box titled "Declining request for service" with a close button (X) in the top right corner. Below the title is the label "Decline reason". There is a dropdown menu with the placeholder text "Please select a reason" and a downward arrow. The dropdown is open, showing a list of options: "Please select a reason", "No Capacity to accept referral", "No Capability to accept referral", "Insufficient participant budget to accept referral", and "Other". Below the dropdown is a large text input field. To the right of the input field, it says "500 characters left". At the bottom of the dialog, there are two buttons: "Close" and "Decline request".

Figure 37 Declining a request for service

- Select the appropriate reason from the dropdown box, the options are:
- No capacity to accept referral
- No capability to accept referral
- Insufficient participant budget to accept referral
- Other

You may leave additional comments about why you declined the request in the textbox. If you selected 'Other' this field is mandatory, and you must provide additional comments.

6. Click **Decline request** to complete.
- The decline will be confirmed in a banner displayed across the top of the page.

View the details of an accepted Request for service

After accepting a request for service, you will be able to view additional details about the participant and the request. This includes:

- Participant name,
- Participant and participant representative contact details,
- Participant context,
- Reporting tasks, and
- Submitted reports.

[Back to Request for service](#)

Brandyn Release Torp's profile (534170427)

Request for service accepted on Monday 5th February 2024

Basic details

Request ID	Participant name	Age	Location	Support budget	NDIS contact
00008822	Brandyn R Torp	33		\$72,000.00 over 36 months	enquiries@ndis.gov.au

[Contact details](#) [Participant context](#) [Reporting tasks](#) [Submitted reports](#)

Contact details

View the Participants or Participants Representative contact details.

Full name of contact	Relationship	Preferred contact method	Contact Phone	Contact Email	Interpreter
Brandyn Release Torp	Not applicable	Email	0400000000	brandyn.torp@testdata.email	Auslan

Figure 38 Request for service details page, available after accepting a request

To navigate the details of an accepted request for service use the links on the page

[Contact details](#) [Participant context](#) [Reporting tasks](#) [Submitted reports](#)

Figure 39 Request for service details page, details links

Contact Details

Contact details of the participant and/or the participant's representative contact details.

Participant context

Participant context includes additional information about the participant and their disability, including:

- Disability information.
- Whether the participant requires an interpreter, and what language they use.
- Purpose of the referral and type of funded request.
- Report frequency.

Reporting tasks

Reporting tasks shows how often progress reports must be uploaded, and when the next report is due. It also allows for reports to be uploaded.

Submitted reports

Submitted reports shows a history of previously submitted reports for the selected request for service.

Reporting tasks

This tab displays all the reports that are due for your participants in the next 60 days.

1. Select the Request for service tab.
2. This will display the Request for service page, select the link to the **Reporting tasks** section.
3. This will display a list of reporting tasks for all the organisation's participants, with columns for:

Request ID: The unique ID for each request.

Participant name: The participant's current age.

NDIS Number: The participant's suburb.

Report Type: The main disability experienced by the participant.

Due in: The number of days until the listed report is due, or Overdue if the report is past its due date.

Request tasks

Reporting tasks due in the next 60 days

Reports are a mandatory requirement which must be uploaded by the due date.

RFS number	Participant name	NDIS No.	Report type	Due in
12345678	Jessica Farrington	1234567	Implementation report	Overdue
12345678	Steven Jacobs	1234567	Progress report	Overdue
12345678	Gerald Johnson	1234567	Progress report	Due in 23 days
12345678	Paul Newton	1234567	Implementation report	Due in 58 days
12345678	Andrew Simmons	1234567	Progress report	Due in 60 days

Figure 40 Reporting tasks for accepted requests

- Click the link on the Participant name to access the **upload report** page.

Uploading reports for a Request for service

1. To upload a report, access the Reporting tasks section of the relevant Request for service details page.
2. On the Reporting tasks page, check the type of report required, the due date and click the Upload report button.
3. You will be prompted to select a report file -files can be uploaded in the following formats and limitations:
 File name: 30 characters long
 File types: doc, docx, xls, xlsx, csv, pdf, jpeg, jpg, jpe, gif, bmp, png, xml, txt
 Document size: 10 MB
4. Click Upload to start the upload and submit the report.

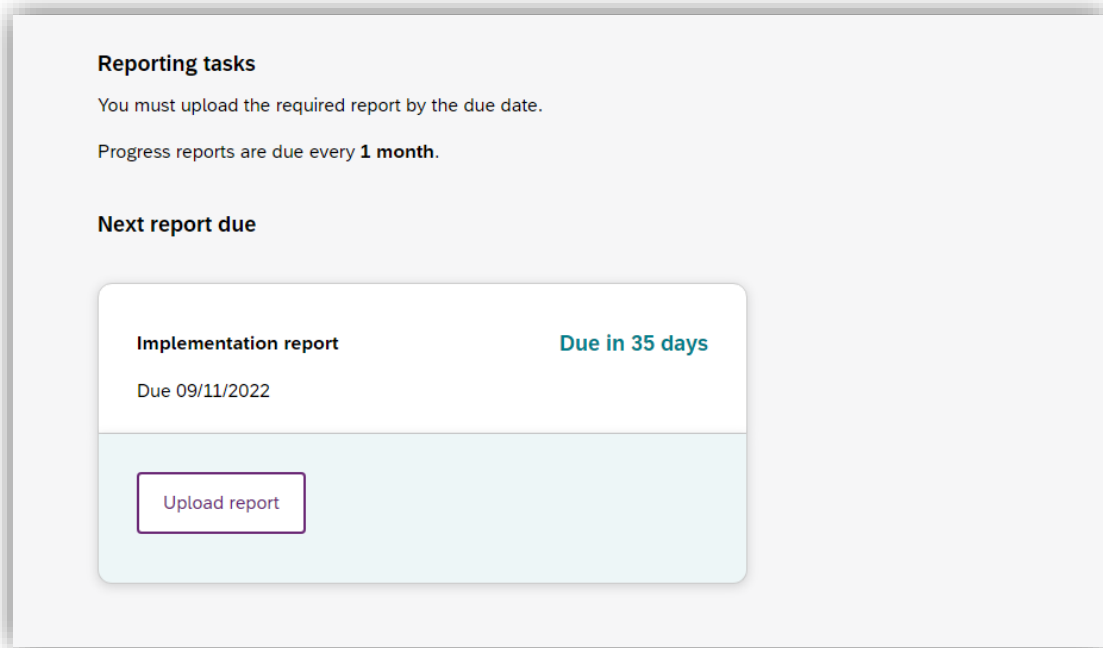


Figure 41 Request for service, report upload page

5. Once complete a banner will appear at the top of the page confirming that you have successfully uploaded a report.
6. You can review previously submitted reports in the previously submitted reports section of the request for service detail page.

Organisation

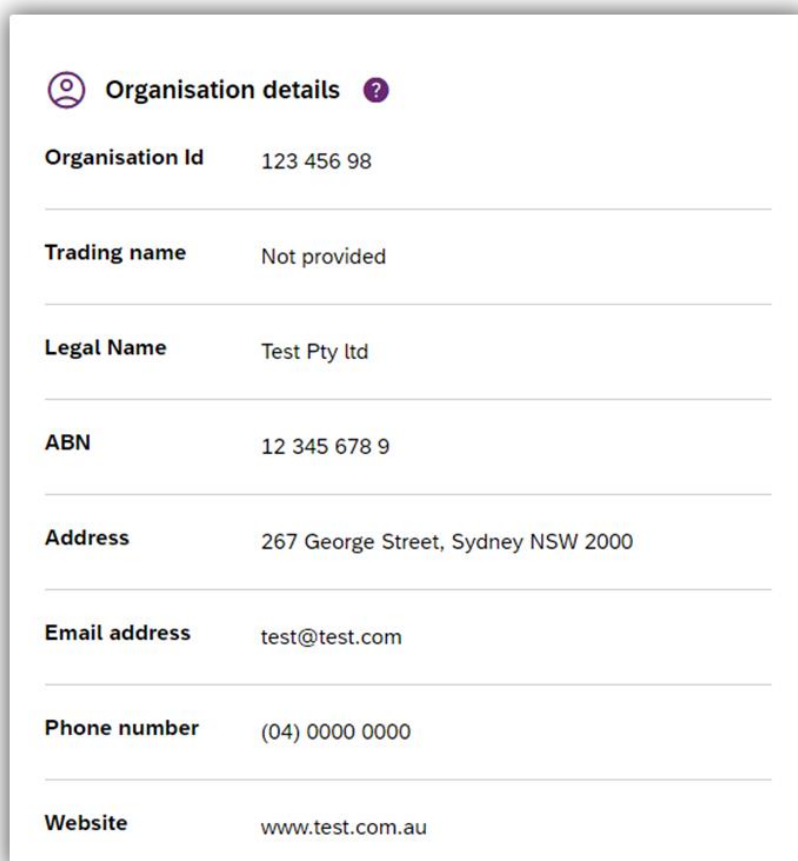
The Organisation tab allows you to view your Organisation details, Employees and Participants. It also allows you to request reports to extract key information out of my NDIS provider portal related to PACE participants and PACE claims.

Plan Managers will be able to view a Relationship request tab.

View Organisation details

The Organisation tab shows details stored about your organisation; these are:

- Organisation ID number
- Trading name
- ABN
- Address
- Email address
- Phone number
- Website address



Organisation details ?	
Organisation Id	123 456 98
Trading name	Not provided
Legal Name	Test Pty ltd
ABN	12 345 678 9
Address	267 George Street, Sydney NSW 2000
Email address	test@test.com
Phone number	(04) 0000 0000
Website	www.test.com.au

Figure 42 Organisation details

View Employee details

To view your employee's details, select the Employees tab, the Employees tab shows a list of your employee's name, role, start date and end date.

Organisation details Employees

Employee list

Search Filters

Employee name	Role	Start date	End date
Alex test Paccount	Account Manager	14/08/2022	

Figure 43 Employee list

To view the 'Employees history', select the hyperlink on the employee's name and the role history page will list the employee's role, start date and end date.

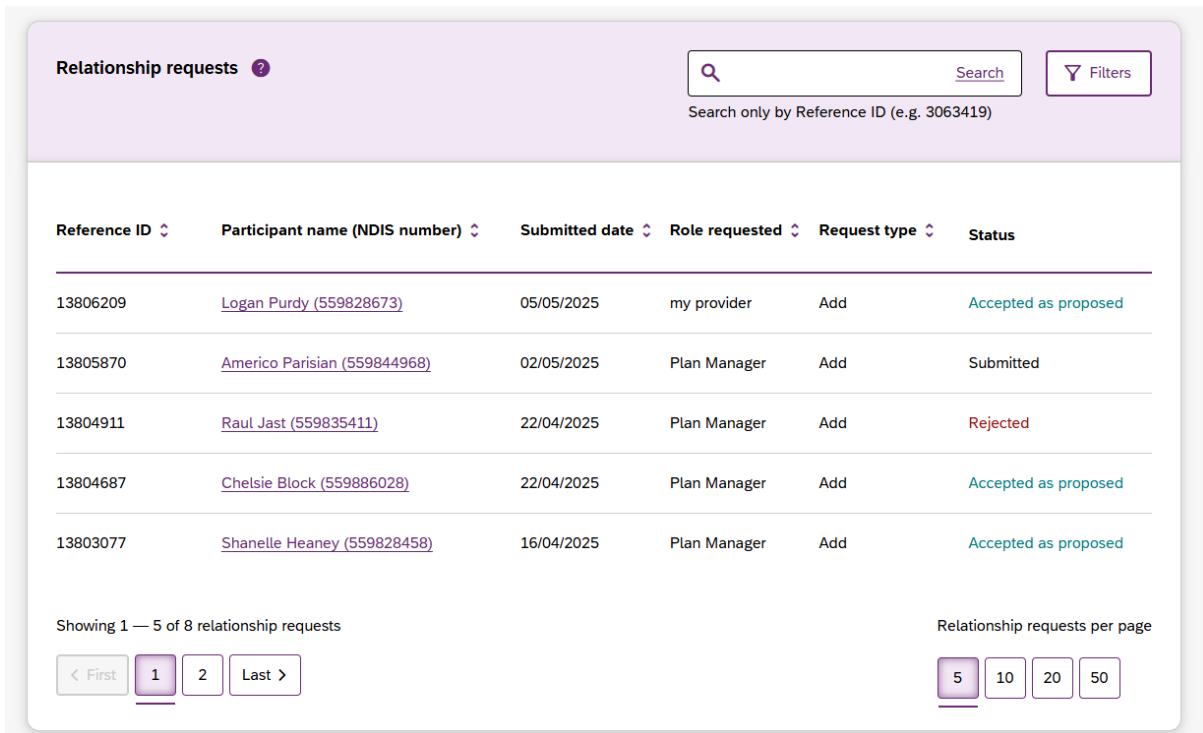
Role history

Role	Start date	End date
Account Manager	14/08/2022	

Figure 44 Employee list, Role history

Relationship request tab for Registered Providers

The Relationship Requests tab displays a list of requested relationships. The information available is the Reference ID, Participant name (NDIS number), the date the request was submitted, the role requested, the type of request and request status.



Relationship requests ?

Search Search Filters

Search only by Reference ID (e.g. 3063419)

Reference ID	Participant name (NDIS number)	Submitted date	Role requested	Request type	Status
13806209	Logan Purdy (559828673)	05/05/2025	my provider	Add	Accepted as proposed
13805870	Americo Parisian (559844968)	02/05/2025	Plan Manager	Add	Submitted
13804911	Raul Jast (559835411)	22/04/2025	Plan Manager	Add	Rejected
13804687	Chelsie Block (559886028)	22/04/2025	Plan Manager	Add	Accepted as proposed
13803077	Shanelle Heaney (559828458)	16/04/2025	Plan Manager	Add	Accepted as proposed

Showing 1 — 5 of 8 relationship requests

Relationship requests per page

< First 1 2 Last >

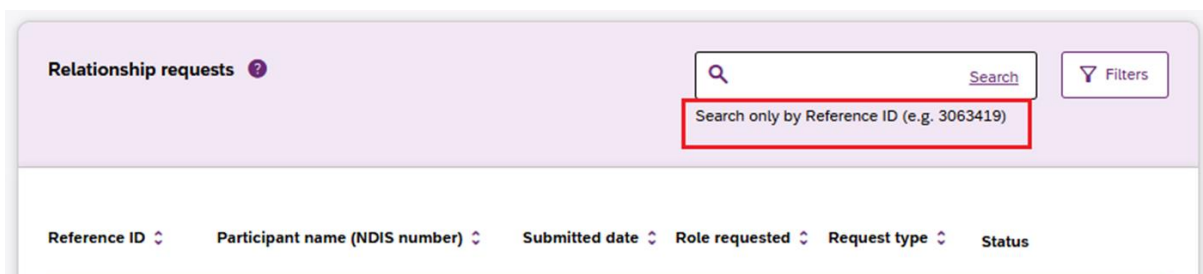
5 10 20 50

Figure 45 Relationship Requests

Note: The participant's name is withheld until the relationship request has been approved.

You can now Search by:

- Reference ID (A guide text is displayed next to the search box, see figure below)



Relationship requests ?

Search Search Filters

Search only by Reference ID (e.g. 3063419)

Reference ID	Participant name (NDIS number)	Submitted date	Role requested	Request type	Status
--------------	--------------------------------	----------------	----------------	--------------	--------

Figure 46 Relationship Requests, Search box

Note:

- Input a minimum of 3 numbers in the search box to retrieve the required results. System will display an error message for anything less than 3 numbers in the search box.
- Default sorting of the columns is in descending order of submitted date.
- A secondary sort order is introduced:
 - When columns other than the 'Participant Name (NDIS Number)' and 'Submitted date' are sorted, the secondary sort order is ascending on participant first name (A to Z).
 - When the 'Participant Name (NDIS Number)' column is sorted, the secondary sort order is ascending on Submitted date (Oldest to newest).

Maximum display of 2000 requests on the Relationship requests page

This list will display a maximum of 2,000 records. The below error message will appear if this limit is exceeded. To view the remaining records, use the search and filter tools.

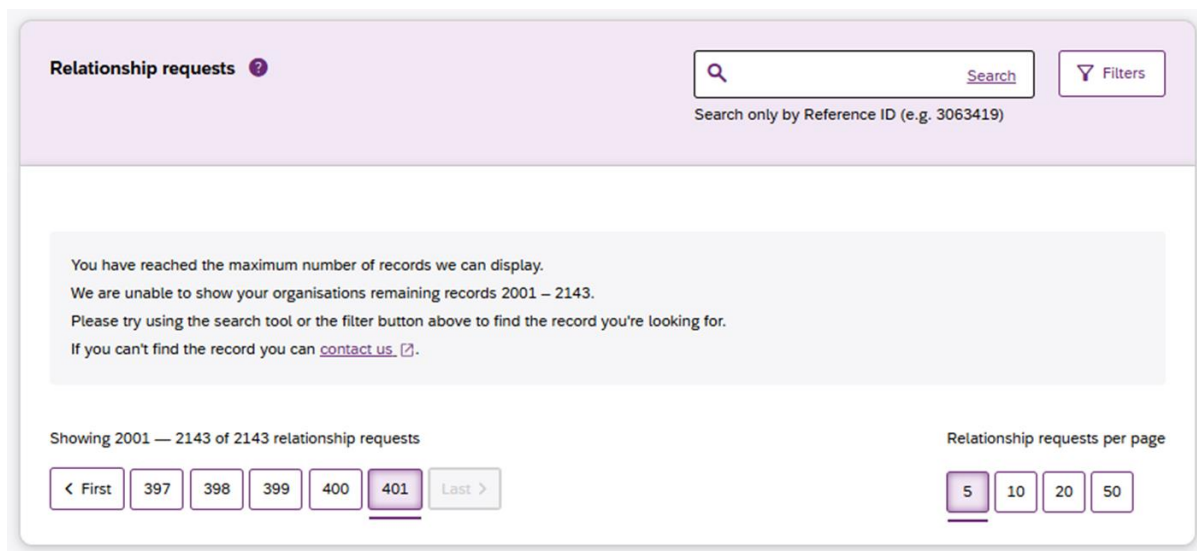


Figure 47 Relationship requests 2k limit error page

Submit a new relationship request

You can submit a request to be added as a Plan Manager, my provider, or my provider at support category level by clicking on the **Add new request** button.

The New relationship request page will open with the following fields. Complete all the details and select the **Submit request** button.

[< Back to My organisation](#)

New relationship request

To request a new plan manager or my provider relationship, fill in the participants details below. You will need to submit multiple my provider role requests, if you would like to add more support categories. Make sure all fields are filled in.

Request details

Requested role

my provider

Plan Manager

Participant last name

Participant NDIS number

Figure 48 New Relationship Request form

Note: When my provider option is selected under the ‘**Requested role**’ form field, the ‘Specialised support category’ field becomes visible and has the ‘No support category’ option selected by default.

If you wish to request my provider – support category role, after selecting my provider option, you will need to select the support category that you wish to add to my provider role.

Requesting my provider - support category role or a plan manager role automatically creates my provider role. My provider role will need to exist until the last day of either my provider - support category role or a plan manager role.

The screenshot shows a form with two main sections. The first section, titled "Requested role", contains two radio button options: "my provider" (which is selected) and "Plan Manager". The second section, titled "Specialised support category" with an information icon, features a dropdown menu. The dropdown is currently open, showing the selected option "No support category" and three other options: "Behaviour Support", "Home and Living", and "Specialised Disability Accommodation (SDA)".

Figure 49 Requesting my provider role at a support category level.

If details or information provided is incorrect, then you will be able to view a message on the screen to assist in fixing the incorrect field.

If, however, the details or information provided is correct, then you will be directed to the Organisation page with the Relationship request tab open. Here you will see a message that the request is submitted successfully. The recently submitted request appears at the top of the Relationship requests table. However, participant details will be withheld until the relationship request has been approved.

Submit an Extend or End role request

Guidance on how to extend or end current provider roles is provided on [Page 23](#) of this document.

Downloadable reports

The Downloadable Reports tab displays a list of reports requested in the past 24 hours. The information available is the type of report, request submitted date, file generated time, status.

My organisation: DEJAY MEDICAL & SCIENTIFIC PTY LTD

Organisation details Employees Relationship requests **Reports**

[Request a report](#)

Available reports
You have 24 hours from when the file is generated to download the report.

Type of report	Request submitted date	File generated time	Status	Action
Participants budget report	07/07/2025	N/A	Requested	Download not available
PACE claims history report	07/07/2025	N/A	Requested	Download not available
PACE claims history report	07/07/2025	9:21 AM	Data limit exceeded	Download
My participants report	07/07/2025	9:35 AM	Ready	Download
Notifications report	07/07/2025	1:06 PM	Ready	Download

Showing 1 — 5 of 6 available reports

Available reports per page

< First 1 2 Last >

5 10 20 Show all

Figure 50 Available reports

You can request a report by clicking the **Request a report** button, which will open the Request a report page where you can select the type of report you want.

Each type of report has different filters, these are listed in Table 2 (below).

Table 2 Filter options for reports

Report type	Filters
Notifications	Received date from Received date to Notification category
My participants	Role start date Role end date From date To date Provide role

Participant budget report	First letter of participant surnames Role start date from Role start date to
PACE claims history report	Claim submitted date Support start date Claim Status, or A Specific claim reference number.

Request a report

Requesting a report may take several minutes to generate. Moreover, the report is limited in how much data it can hold. Use the filters for the type of report to refine your request. All fields are mandatory.

Report details

Select the type of report you would like to request

Notifications report ▼

Select a period of dates for when you received notifications
(Maximum of 30 days)

Received date from

📅

dd/mm/yyyy

Received date to

📅

dd/mm/yyyy

Select one or multiple notification categories you wish to export

Select all

Request for service

Participant relationship - New

Participant relationship - Update

Participant plan

Discard

Request report

Figure 51 Request a report page showing notifications report.

After submitting your request, it will appear in the Available reports list. When a report is ready you can also download the .csv report file using the link in the action column.

Note: Report files are available to be downloaded for 24 hours. Also, only three reports of each type can be requested every 24 hours.

Submit a payment enquiry

You can submit a new payment enquiry on behalf of your organisation or submit a follow-up on a closed enquiry.

Submit a new payment enquiry

To submit a payment enquiry, click onto the **Enquiries** tab on the global navigation bar.

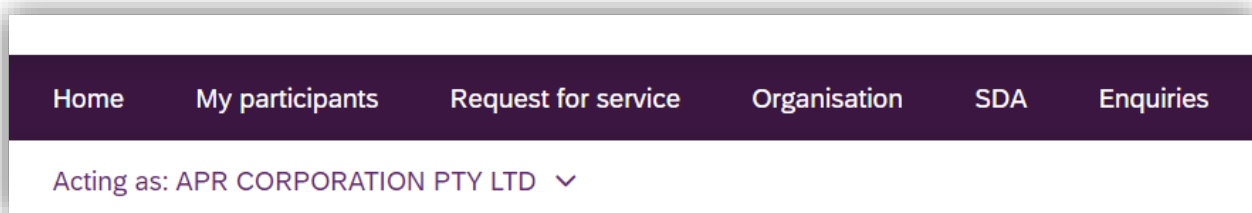


Figure 52 Enquiries tab on the global navigation toolbar

1. Click onto Lodge a new enquiry

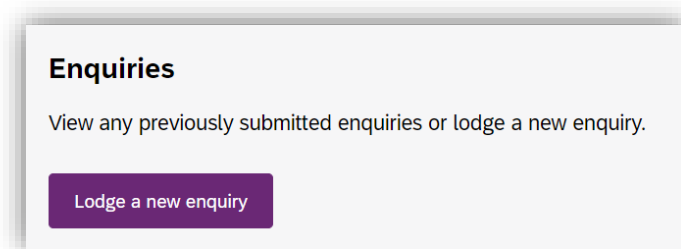


Figure 53 Lodge a new enquiry

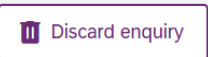
2. Select an enquiry type drop-down is automatically prefilled.


Note: All other enquiry types, including complaints and feedback, can be submitted through the myplace provider portal.

3. To create a new enquiry, select: **Yes, this is a new enquiry**

[< Back to Enquiries](#)

Submit a new enquiry


 Discard enquiry


Your details 


NDIA will respond to this enquiry using the details below. Please ensure your email address is accurate.

Organisation: My Support Coordinator	Name: Price bestv1 Loyal
Email: arora.challa@ndis.gov.au	

What type of enquiry would you like to submit?

Select an enquiry type 

Claim and payment enquiry 

 **Enquiries under construction**

Submit claim and payment enquiries using the my NDIS provider portal. For all other enquiries, please use the my place provider portal.

Is this a new enquiry?

Yes, this is a new enquiry

No, I am following up on a closed enquiry

Figure 54 Submit a new enquiry

4. Complete the details of the payment enquiry section by selecting a category:
 - **Issue with a bulk file**
 - **Issue creating or editing a service booking**
 - **Claims rejected**
 - **Payment not received**
 - **Issue cancelling claims**
 - **Other claim or payment enquiry**

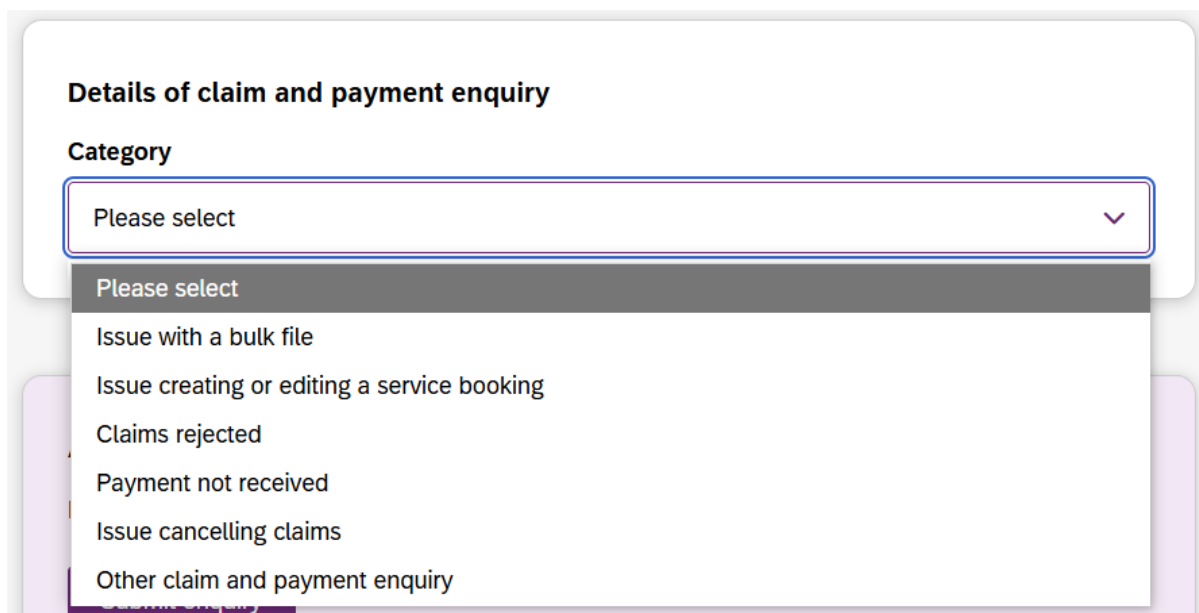


Figure 55 Enquiry categories

Note: The information you are required to submit is dependent on the payment enquiry category you have selected. Please make sure that you complete each field as required.

Each category has additional information explaining what is required before submitting your payment enquiry.

For each category, there are compulsory fields you need to complete. These include the **Enquiry title**, **Participant last name**, **Participant date of birth**, **Support start date**, **Support end date**, **Total value of claim(s)**, and **Enquiry description**.

This is except for the following categories:

Issue with a bulk file and **other claim or payment enquiry** where compulsory fields include **Enquiry title** and **Enquiry description**.

Issue creating or editing a service booking where compulsory fields include **Enquiry title**, **Participant last name**, **Participant date of birth** and **Enquiry description**.

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

The file must be no larger than 5MB each. Up to 10 files may be uploaded.

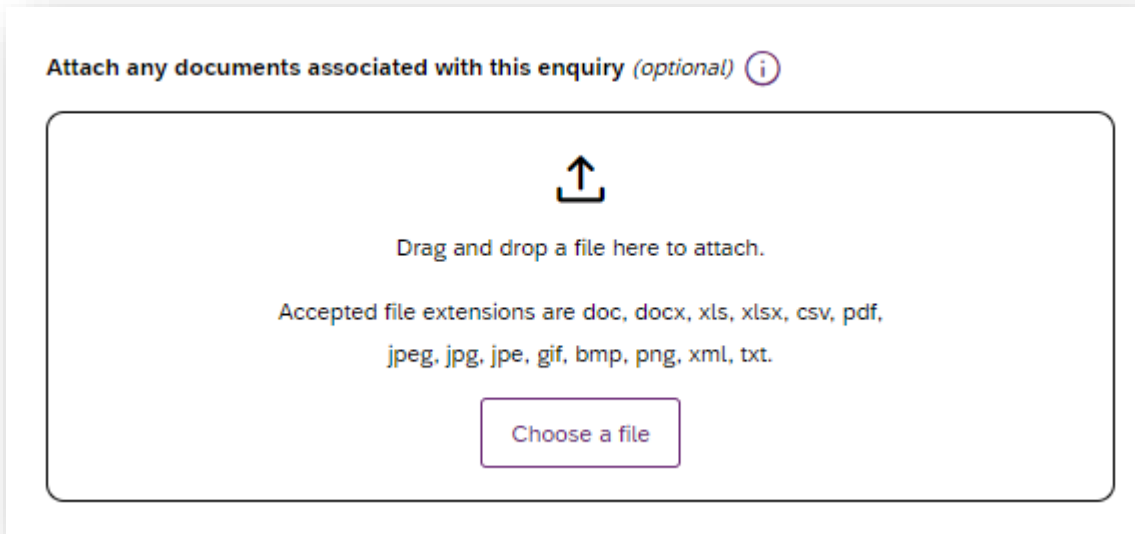


Figure 56 Attaching a file to your enquiry

A list of your organisation's submitted payment enquiries via my NDIS provider portal will be displayed on the **Enquiries** page. To review or receive updates on all payment enquiries submitted previously via the myplace provider portal, you will need to navigate to the myplace provider portal.

Enquiries

View your submitted enquiries or lodge a new one

Lodge a new enquiry

Enquiry ID	Type of enquiry	Enquiry title	Submitted date	Status
10293847	Claim and payment	Bulk claim upload issue with file	06/10/2022	Open
38557777	Claim and payment	Cancellation is not working when claim is can...	04/10/2022	In progress
03948273	Claim and payment	Claim ID #4348729 rejection reason	02/10/2022	In progress
20393834	Claim and payment	Service booking cannot be connected to participant	02/10/2022	Closed
92023999	Claim and payment	Claim ID #92839182 not received	26/09/2022	Closed

Showing 1 - 5 of 10 enquiries

< First 1 2 Last >

Enquiries per page: 5 10 25

Figure 57 Enquiry page

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

Open – We have received your enquiry.

In progress – Your enquiry is under review. We may contact you for further information.

Closed – Your enquiry is resolved. Confirmation of the outcome of your enquiry has been sent to you.

Note: Only payment enquiries submitted by your organisation will be visible in the Enquiries list. For example, any enquiries submitted by NDIA staff members, on your behalf will not be listed here.

Submit a payment enquiry on a closed enquiry

To submit a payment enquiry, click onto the Enquiries tab.

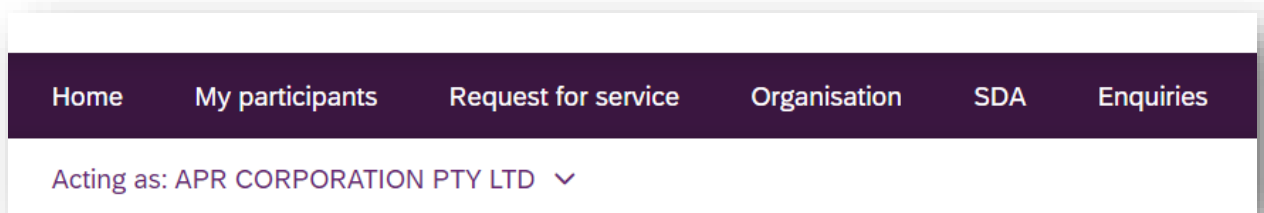


Figure 58 Enquiries tab on the global navigation toolbar

1. Click onto Lodge a new enquiry

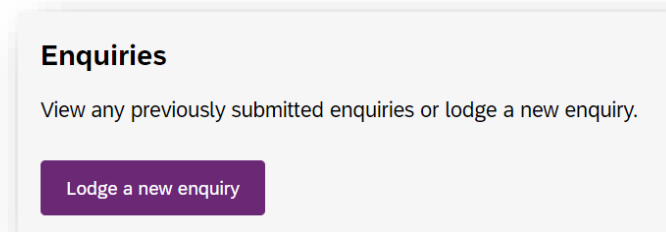


Figure 59 Lodge a new enquiry


2. Select an enquiry type dropdown is automatically prefilled.

Note: All other enquiry types, including complaints and feedback, can be submitted through the myplace provider portal.

3. Choose: **No, I am following up on a closed enquiry**

[< Back to Enquiries](#)

Submit a new enquiry

 Discard enquiry

Your details

NDIA will respond to this enquiry using the details below. Please ensure your email address is accurate.

Organisation:

My Support Coordinator


Name:


Price bestv1 Loyal

Email:

arora.challa@ndis.gov.au

What type of enquiry would you like to submit?

Select an enquiry type 

Claim and payment enquiry 

Enquiries under construction

Submit claim and payment enquiries using the my NDIS provider portal. For all other enquiries, please use the my place provider portal.

Is this a new enquiry?

- Yes, this is a new enquiry
- No, I am following up on a closed enquiry

Figure 60 Follow up on a closed enquiry

The following compulsory fields appear for you to fill in: **Enquiry title**, **Closed enquiry number**, **Date submitted** and **Follow-up comment**.

Please note: In the 'Closed enquiry number' field, you may enter the 'Enquiry number' of a closed payment enquiry raised in my NDIS provider portal or the 'Submission ID' of a closed payment enquiry raised in the myplace provider portal. If there are associated documents, select **Choose a file** to attach them. You can attach documents in.doc, .docx, .xls, .xlsx, .csv, .pdf, .jpeg, .jpg, .jpe, .gif, .bmp, .png, .pnt, .pntg, .xml, .txt format.
The file must be no larger than 5MB each. Up to 10 files may be uploaded.

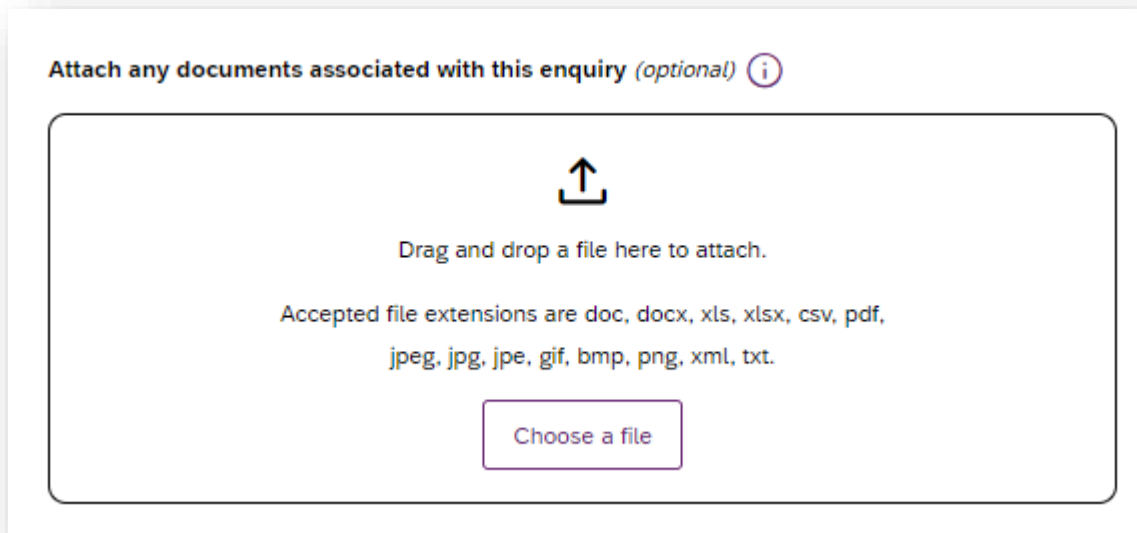


Figure 61 Attaching a file to your enquiry

View existing payment enquiries

Note: Enquiries created before 5 May 2024 can be viewed in the myplace provider portal.

Payment enquiries created after 5 May 2024 will be displayed in the Enquiries page of my NDIS provider portal.

You can only view your enquiry in the portal from where it was originally created.

Enquiries

View any previously submitted enquiries or lodge a new enquiry.

[Lodge a new enquiry](#)

Enquiries list

Enquiry ID	Type of enquiry	Enquiry title	Date submitted	Status
03446300	Claim and Payment Enquiry	test	17/04/2024	Open
03446298	Claim and Payment Enquiry	test	17/04/2024	Open
03446247	Claim and Payment Enquiry	test	17/04/2024	Open
03446183	Claim and Payment Enquiry	test	17/04/2024	Open
03446182	Claim and Payment Enquiry	test	17/04/2024	Open

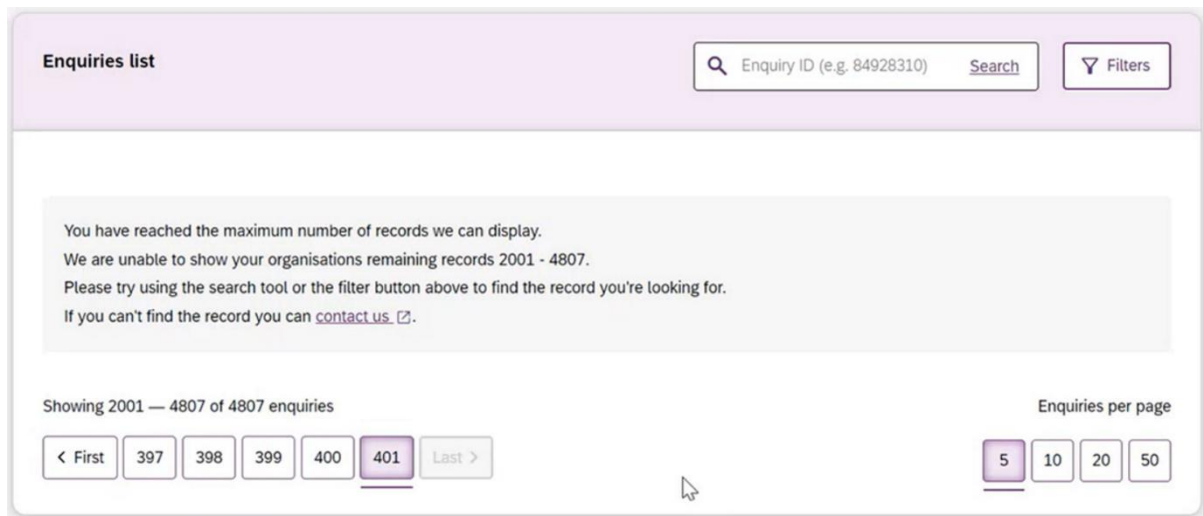
Showing 1 — 5 of 11 enquiries

Enquiries per page:

Figure 62 List of previously lodged enquiries

Maximum display of 2000 Records on the Enquiries page

This list will display a maximum of 2,000 records. The below error message will appear if this limit is exceeded. To view the remaining records, use the search and filter tools.



The screenshot shows the 'Enquiries list' interface. At the top, there is a search bar with the placeholder text 'Enquiry ID (e.g. 84928310)' and a 'Search' button, along with a 'Filters' button. Below this, a light grey box contains the following error message:

You have reached the maximum number of records we can display.
We are unable to show your organisations remaining records 2001 - 4807.
Please try using the search tool or the filter button above to find the record you're looking for.
If you can't find the record you can [contact us](#).

Below the message, it says 'Showing 2001 — 4807 of 4807 enquiries'. To the right, there is a section for 'Enquiries per page' with buttons for 5, 10, 20, and 50. At the bottom, there is a pagination bar with buttons for '< First', '397', '398', '399', '400', '401', and 'Last >'. The '401' button is highlighted with a purple border, and a mouse cursor is pointing at it.

Figure 63 Enquiries page, 2000 records display error message