NDIS myplace participant portal

Step-by-step Guide

2018

NDIS myplace participant portal: Step-by-step guide

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Introduction

The NDIS myplace participant portal is a secure website where you can view your NDIS Plan, update your personal contact details and manage services with your providers. Your information on the NDIS myplace participant portal is protected and cannot be accessed without a myGov account login.

In the myplace participant portal you are able to view and update your personal details, view your plan details as well as update and manage your consent to share plan information with your registered service providers. It is also a secure place for you to manage your plan's funded support budget (including requesting payment if you are self-managing your plan).

This step-by-step guide will help you navigate and use the myplace portal.

Note: this guide is intended for instructional purposes only and all data shown is fictional.

What can you do in myplace?

As a NDIS participant you can use the myplace participant portal to:

- View and update your contact details
- View your NDIS Plan, including information about your funded supports
- View and manage your current plan budget, including request payment for self-managed supports
- Search and locate registered service providers
- Create and manage service bookings with registered service providers
- Securely view NDIS messages
- Manage your consent to share all or sections of your plan with service providers
- Upload required documents

Need more help?

Please direct any queries to the NDIS on **1800 800 110** or visit your local NDIS office.

Sign in

You will need two things to be able to sign in to the NDIS myplace participant portal; a myGov account and an activation code.

For instructions on how to create a myGov account, refer to creating a myGov account on the [myGov help webpage](). Once you have logged into MyGov you will need to link to the National Disability Insurance Scheme (this is done through the **Services** section).
An **activation code** from the NDIS is only needed for the first logon.
The code can be provided to you before you become a participant, or at any time by the NDIS. You can contact the NDIA on **1800 800 110** to obtain an activation code if required or you can request for the code to be issued and sent to you via your preferred method of correspondence.

Note: this code will expire after 10 days so please log in and activate your account as soon as you can. If you are unable to do so you can contact NDIA and request another code to be generated.

Signing in to myplace for the first time

1. Select the myplace participant portal link on the [NDIS website]().
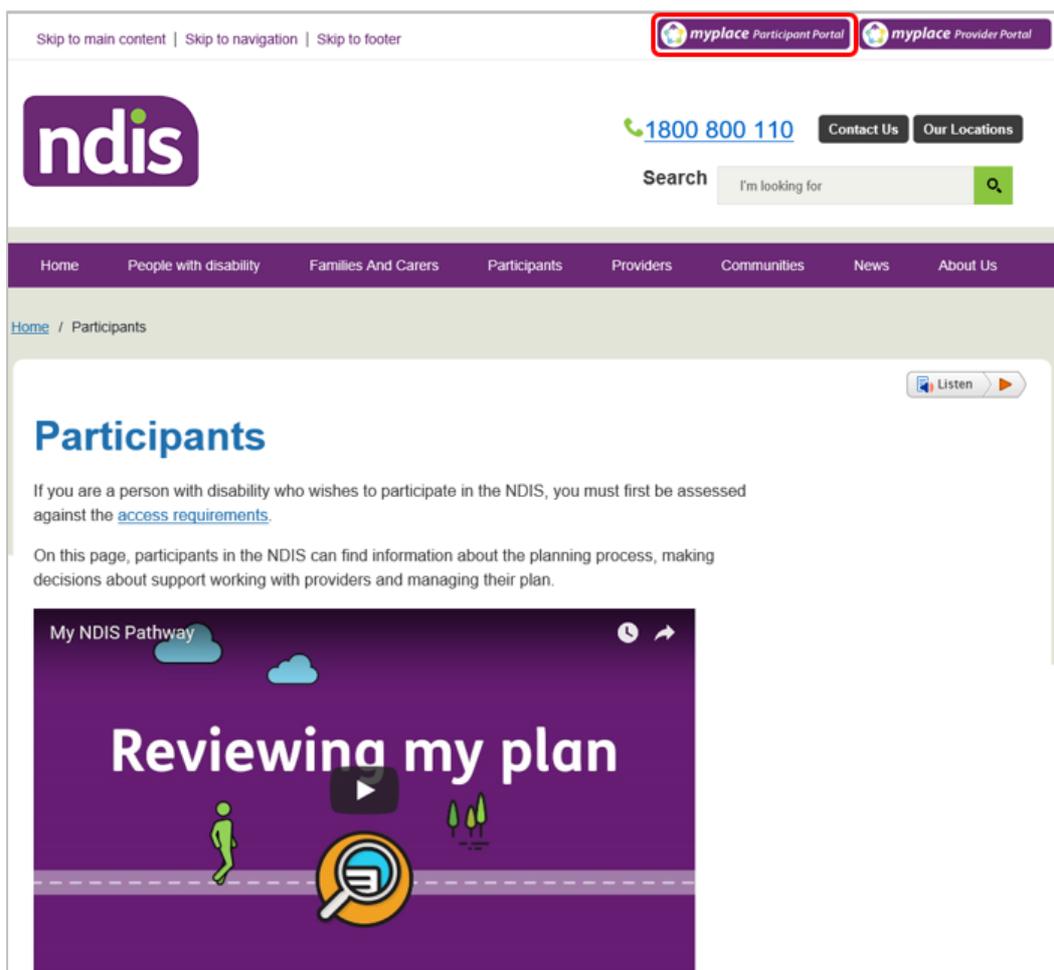
2. Type in your myGov username and password.
Select **Sign in.**
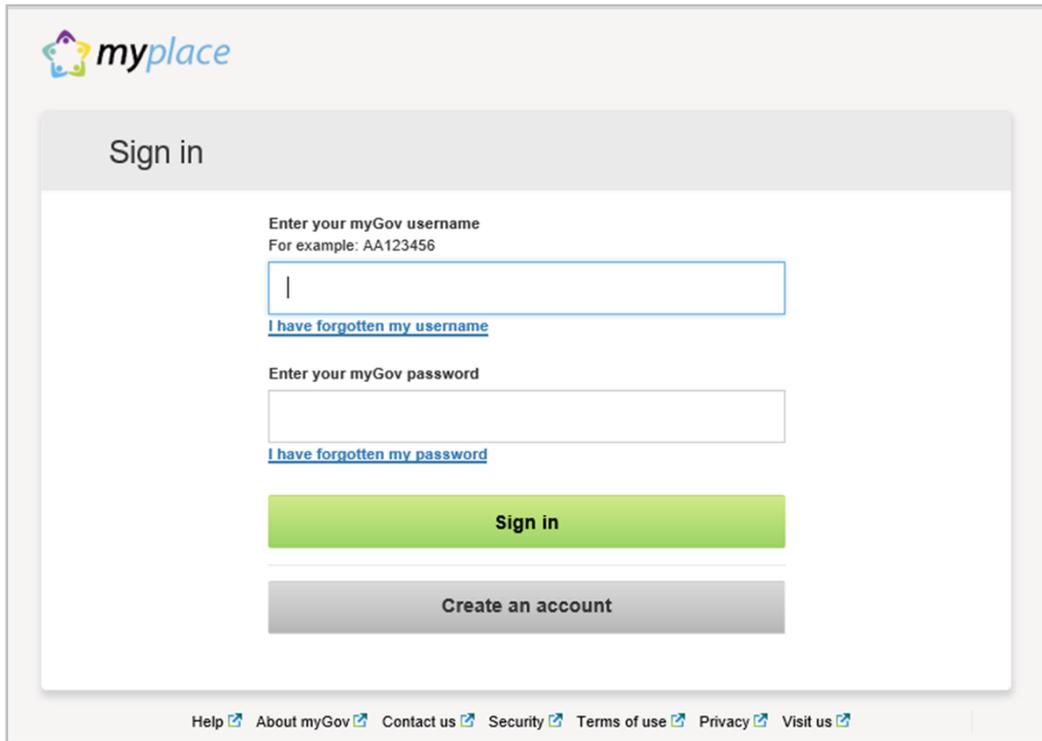
Note: If you are using the secret question, another screen will display.

3. Answer the security question and Select **Next**.

Remember to keep your security code and secret questions in a safe place.
For further information or any concerns relating to your myGov account you can contact myGov.

4. Type in your NDIS **Activation Code**, your **Last Name**, and your **Date of Birth**, then select **Submit**. As mentioned previously you only need to put in the NDIS activation code the first time you access myplace. This screen will not display again.

   If you need a new activation code please contact the NDIA on **1800 800 110**.
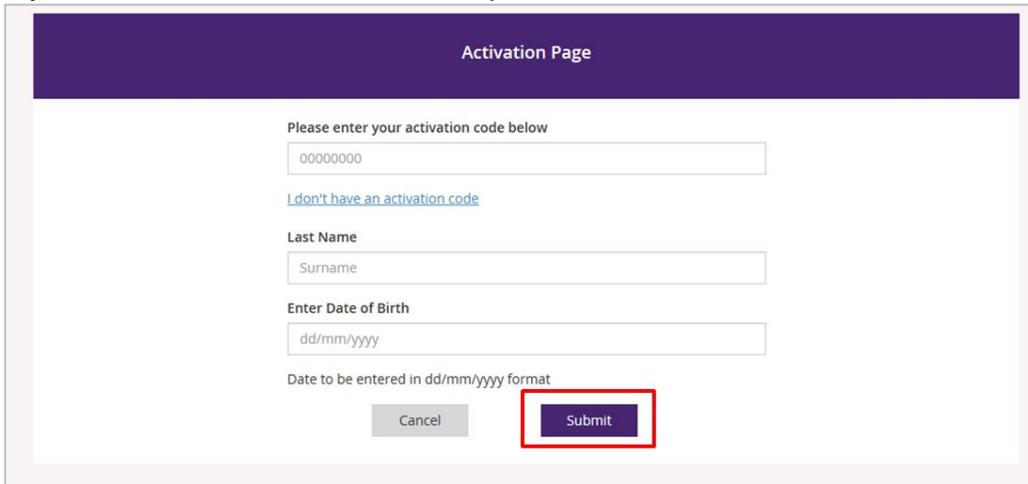
5. You need to accept the **Terms of Use** before you can use the **myplace** portal. The Terms of Use will be displayed the first time you sign in to **myplace** or when there have been updates to the **myplace** portal that you need to be aware of. Move the scrollbar up and down to view the **Terms of Use.**

   If you accept the **Terms of Use**, select the checkbox located next to **I have read and accepted the terms of use** and select **Accept** to continue logging in to myplace.

NDIS myplace participant portal: Step-by-step guide
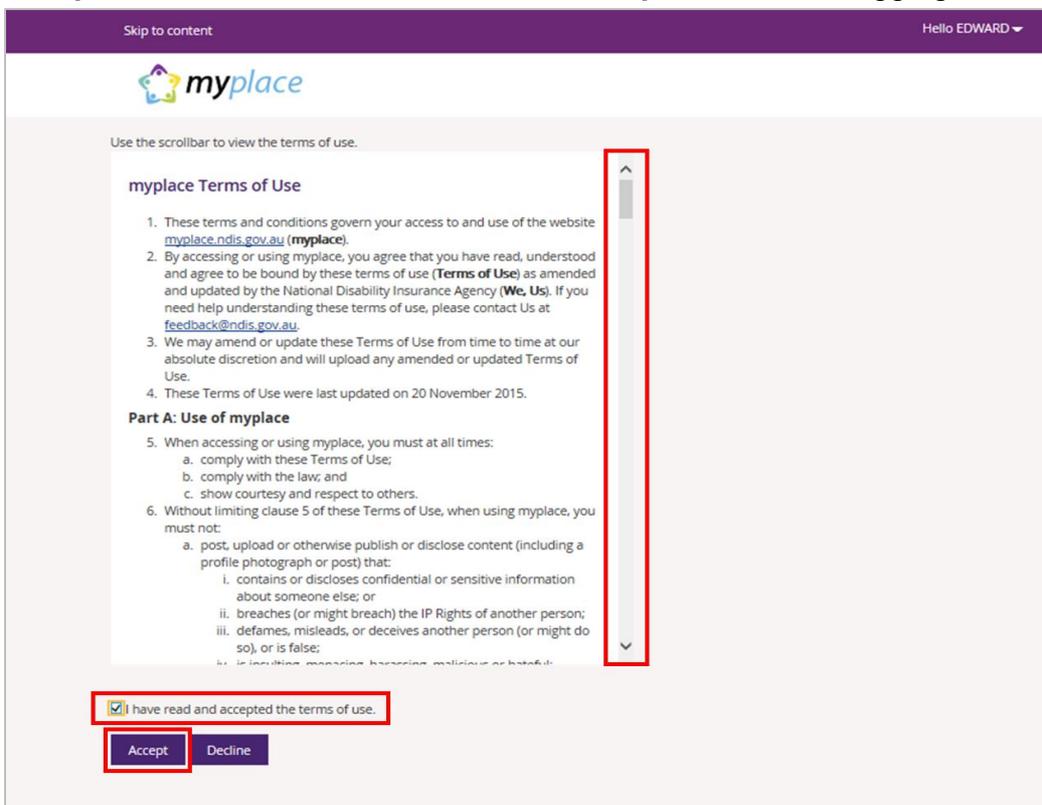
Myplace participant portal homepage

The **myplace** homepage displays once you have signed in. The tiles you see will depend on what stage of the pathway (your NDIS journey) you have reached, and if you are self-managing your plan. For example the **My Plan** tile will become visible on your homepage once you have an approved NDIS plan.

The following table provides you with a brief outline of what function each tile has within the **myplace** portal.

Tile	Name	Function
My Payment Request — Manage Payment Request	My Payment Request	If you are self-managing all or part of your NDIS plan, this is where you can create, view and manage your payment requests (claims).
My Plan — Access all information associated to your plan as well as helpful documents	My Plan	Once you have an approved NDIS plan, this is where you can view the details of your plan.
My Contact Details — View and edit my contact details	My Contact Details	View and edit your contact details, bank account details and consent to share your plan with providers here.
My Service Booking — Create and manage service bookings	My Service Bookings	Once you have an approved NDIS plan, this is where you can create, view and manage your Service Bookings with registered NDIS service providers (not applicable if you are self-managing).
Provider Finder — Find a provider close to you	Provider Finder	Use the Provider Finder to find a registered NDIS service provider near you.
My Messages — Instant message your providers	My Messages	Instant messaging with your providers. (Check with your provider to make sure this function is available for you).
My Document Upload — Upload my supporting documents	My Document Upload	Upload your supporting documents to the NDIA here.
myGov Inbox — View your myGov mailbox	myGov Inbox	View your myGov mailbox.

Tile	Name	Function
My Appointments — View my upcoming appointments	My Appointments	This feature is currently unavailable.

NDIS myplace participant portal navigation

This section will help you navigate each tile within the portal.

As mentioned previously, the tiles you see on your own homepage will depend on which stage you are up to in your journey along the NDIS pathway.

How do I return to the NDIS myplace participant portal homepage?

There are two ways you can return to the homepage.
One option is to select the **myplace** logo, as displayed below.

Another option is to select the **Home** button.

Help with the tile functions

At any time if you have any questions about the tile functions on a page select the question mark icon for a simple explanation.

In the lower left corner of the screen there is an option to contact the NDIA, select **Contact Us** for further information and detail on how to contact us.

NDIS myplace participant portal: Step-by-step guide
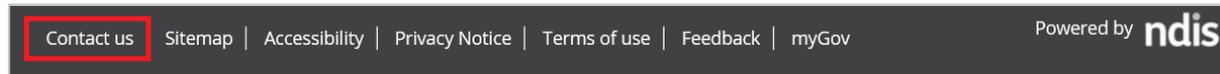
Tiles

Select (or click) a tile displayed on the homepage to go to that function.
For example, selecting the **My Contact Details** tile will take you to the section where you can update your phone number, address and other personal contact information.

My Contact Details

My Contact Details is where you can manage your personal information. This tile is where you can update your address and contact details and view information about your relationships, for example if you have a plan nominee or child representative.

This is also where you can chose to share (or not to share) details of your plan with registered service providers you have a service booking with.
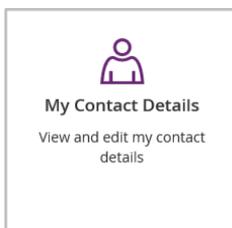
1. Select **My Contact Details** on the homepage.
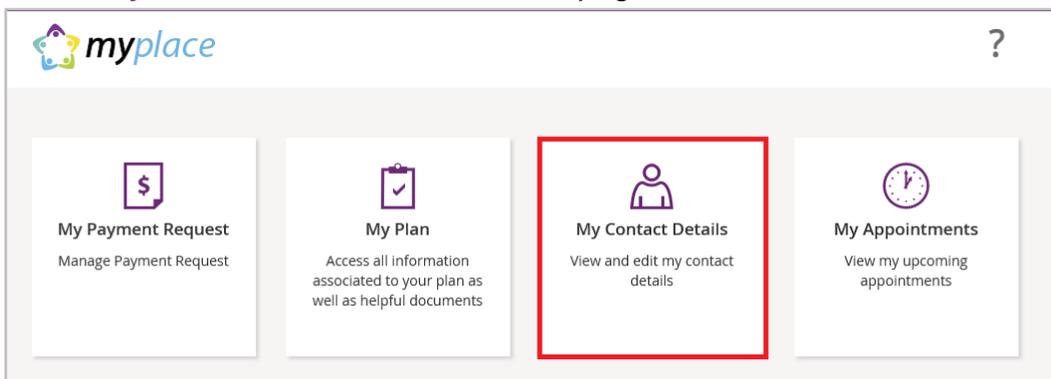
2. The **My Contact Details** screen displays.
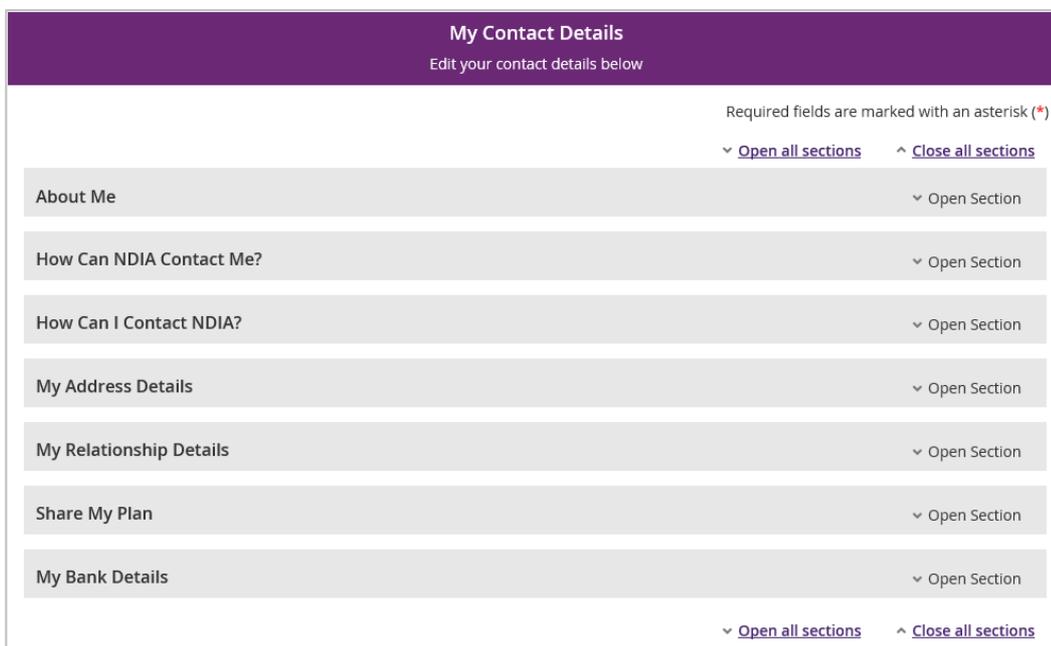
About Me

When you select **Open Section** next to the **About Me** function you can view your full name, preferred name, date of birth, NDIS number, gender, Indigenous origin and Australian South Sea Islander information (if applicable).

If any of these details are incorrect please contact the NDIS to have them updated.

1. Select **Close Section** in the top right hand corner.
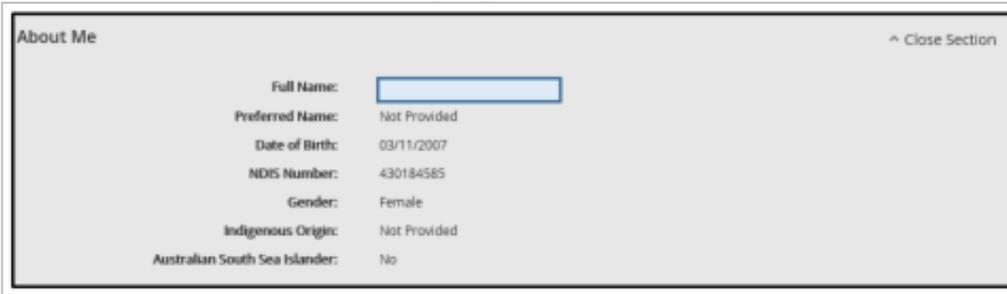
About Me	^ Close Section
Full Name:	
Preferred Name:	Not Provided
Date of Birth:	03/11/2007
NDIS Number:	430184585
Gender:	Female
Indigenous Origin:	Not Provided
Australian South Sea Islander:	No

How Can NDIA Contact Me?

This section is where you can update your preferred method for electronic notifications via SMS or email. Your preferred correspondence method may be via myGov or a letter in the post. This section also displays your contact phone numbers and email address.
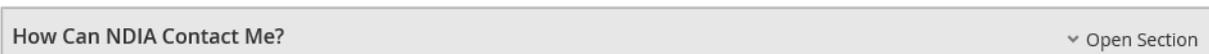
How Can NDIA Contact Me?	⌄ Open Section

1. To amend any information, Select the **Edit** button.
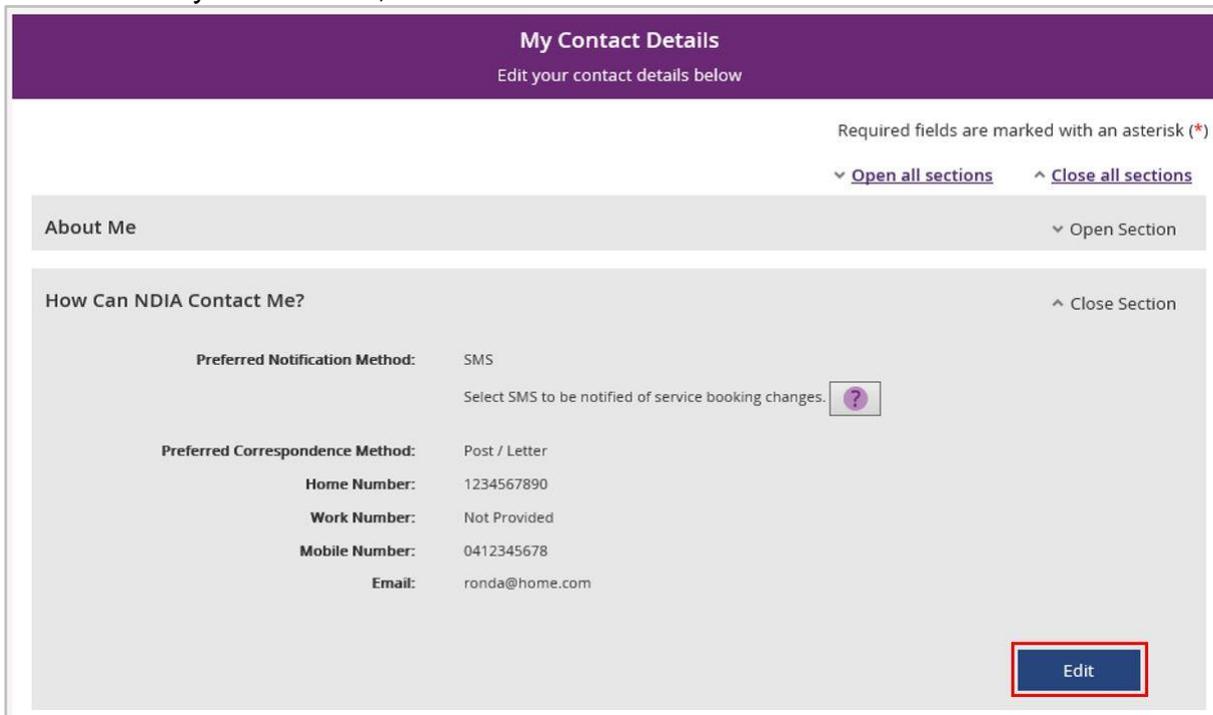
My Contact Details
Edit your contact details below

Required fields are marked with an asterisk (*)

⌄ Open all sections   ^ Close all sections

About Me	⌄ Open Section

How Can NDIA Contact Me?	^ Close Section

Preferred Notification Method: SMS

Select SMS to be notified of service booking changes. ?

Preferred Correspondence Method: Post / Letter

Home Number: 1234567890

Work Number: Not Provided

Mobile Number: 0412345678

Email: ronda@home.com

Edit

2. Once you have made the changes, select **Update to save.**
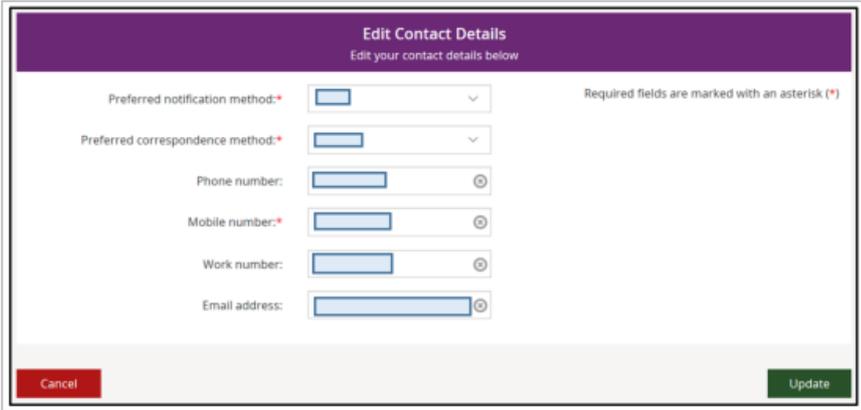
3. You will receive a message confirming the contact details have been successfully updated.

Contact details has been updated successfully.

4. You can change your preferences at any time.

If you do not want to receive notifications, select **No Electronic Notification**.
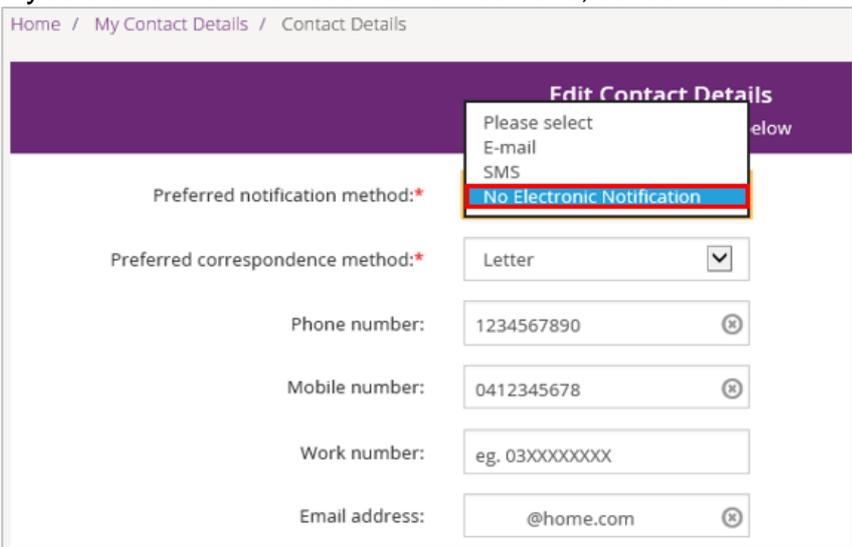
How can I contact the NDIA?

This section will display the contact details for the NDIA with different contact methods available.

How Can I Contact NDIA?

Call NDIA:	1800 800 110
If I use a TTY:	1800 555 677 and ask for 1800 800 110
If I use Speak and Listen (speech-to-speech relay):	1800 555 727 and ask for 1800 800 110
If I use the National Relay Service:	http://relayservice.gov.au and ask for 1800 800 110
If I need help with English:	TIS 131 450

My Address Details

You can view your postal and residential (standard address) addresses.

My Address Details	⌄ Open Section

1. Select the **Edit** icon ✏ to modify the current address or Select the **Add Address** button to add a new address.
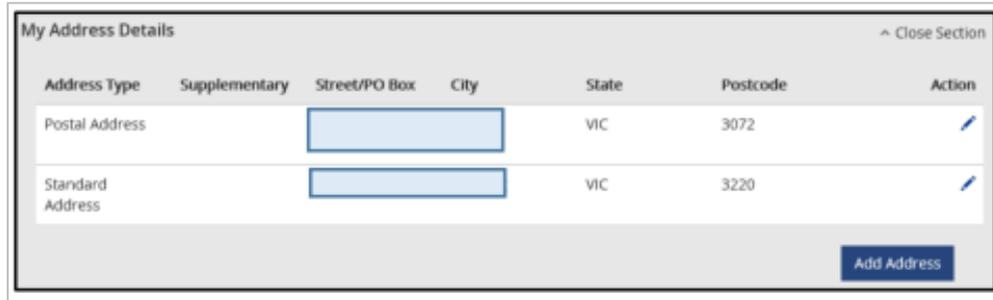
My Address Details						∧ Close Section
Address Type	Supplementary	Street/PO Box	City	State	Postcode	Action
Postal Address				VIC	3072	✏
Standard Address				VIC	3220	✏
						Add Address

2. Select **Close Section** in the top right hand corner.

Note: If adding a new address, the system will automatically put an end date to your existing address.

My Relationship Details

You may have a nominee, representative or family member helping you with your NDIS plan. The names of these people and the type of relationship or role they have with you are listed. If any of these details are incorrect please contact NDIS to have them updated.

My Relationship Details	⌄ Open Section

1. Select **Close Section** in the top right hand corner.
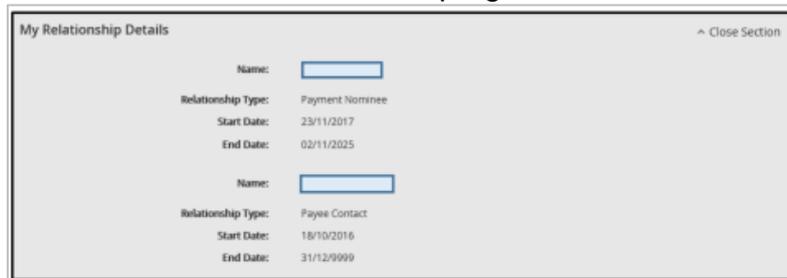
My Relationship Details	∧ Close Section
Name:	
Relationship Type:	Payment Nominee
Start Date:	23/11/2017
End Date:	02/11/2025
Name:	
Relationship Type:	Payee Contact
Start Date:	18/10/2016
End Date:	31/12/9999

Share My Plan

The **Share My Plan** function enables you to share sections of your plan with any service providers you have an active service booking with.

Share My Plan	⌄ Open Section

1. Tick the box next to the provider name/s to share your plan; or deselect the tick to not share.

2. Provide a reason why you are changing access to who can view your plan.

3. Select **Submit** to finalise the changes.

Note: you can change a provider's permission to view your plan at any time. It is your choice if you share your plan details with providers.

4. Select **Close Section** in the top right hand corner to close this section.

My Bank Details

The **My Bank Details** function enables you to view recorded bank details and add new bank account information as needed. When you update your bank account details, the system will send you the following SMS:

"*We have updated your bank account details as requested. If necessary, contact NDIS on 1800 800 110***".*

1. Select **Open Section** to view your bank details.

2. Select **Add Bank Details** to modify or **Add a New Bank Account**.

3. Enter the new account details and then select **Update** to save.

| **Update Bank Details** |
| Edit your bank details below |

Required fields are marked with an asterisk (*)

BSB: *   eg. XXXXXX   ?

Account Name: *   eg. Mr John Smith   ?

Account Number: *   eg. 1XXXXXXXX   ?

Cancel   Update
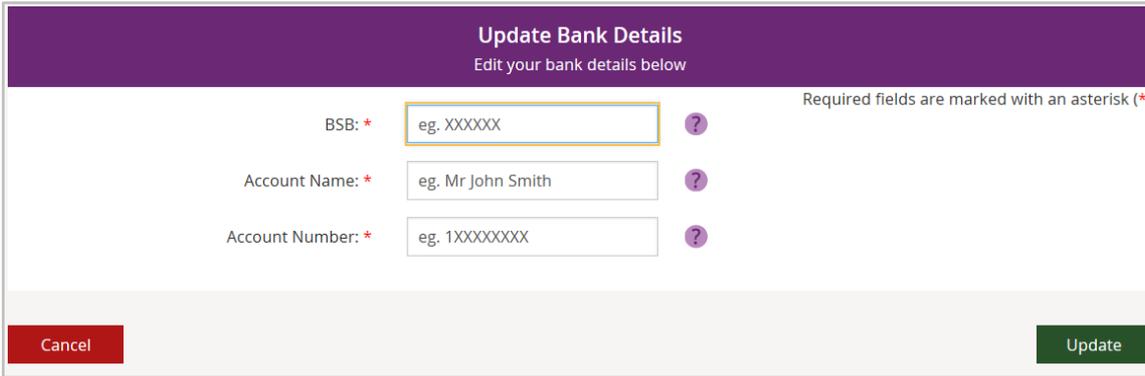
4. Select **Close Section** in the top right hand corner to close this section.

Note: If you are a Plan Nominee or Child Representative managing these NDIS amounts on behalf of a participant please <u>do not</u> update details in the myplace **My Bank Details** screen.

Please contact the NDIS on **1800 800 110** to update the bank account details on your behalf.

5. Select the **myplace** logo, displayed below to navigate back to the homepage.

My Plan

This tile will display when you have an approved NDIS plan. You can use this function to access all the information associated with your plan. You can view your current and previous plans, your support budget and any referrals.

My Plan

Access all information associated to your plan as well as helpful documents
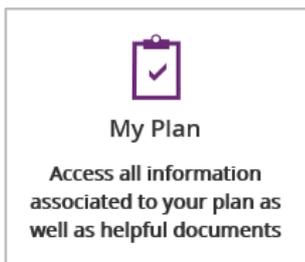
1. Select the **My Plan** tile on the homepage to view all the functions of this tile.

| My Payment Request | My Plan | My Contact Details | My Appointments |
| Manage Payment Request | Access all information associated to your plan as well as helpful documents | View and edit my contact details | View my upcoming appointments |
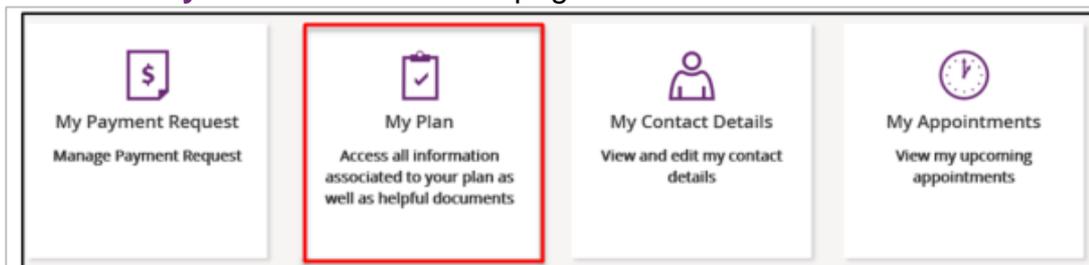
Once the **My Plan** tile opens you will see the following tiles:

- View My Plan
- My Helpful Documents
- My Support Budget
- My Referrals
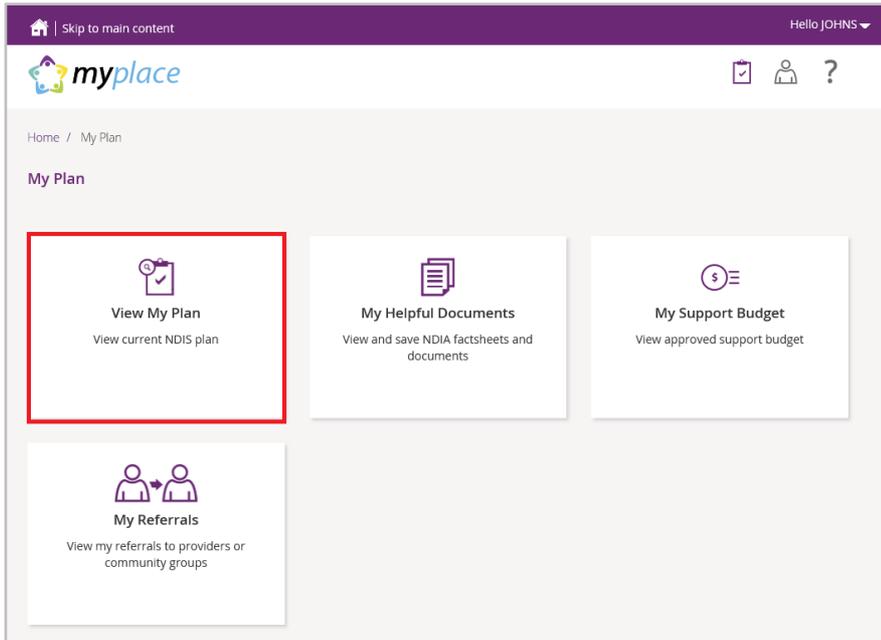
View My Plan

Selecting **View My Plan** enables you to view the details of your approved NDIS plan.

This includes the information you have discussed with the NDIA which was used to develop your plan.
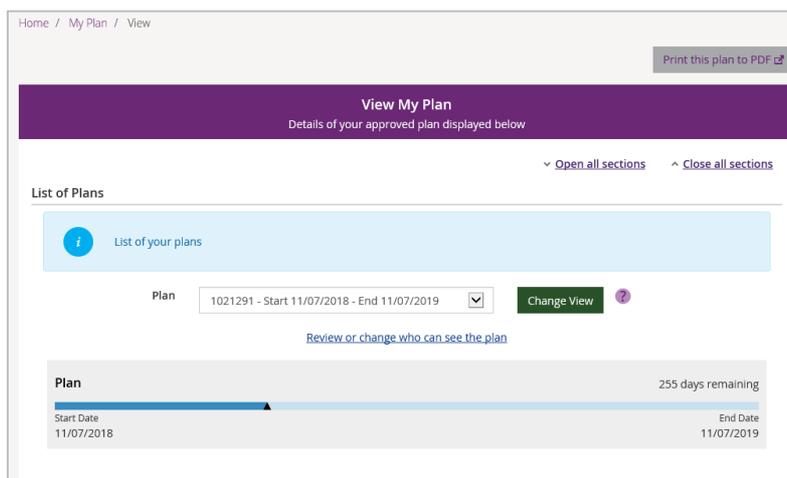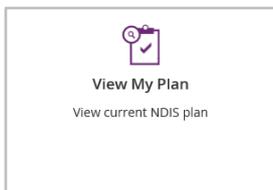
1. A list of your current and previous plans are available at the top of this window, including the start and end dates of your plans.
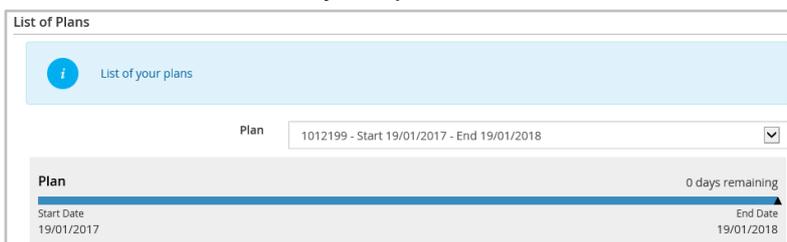
2.   Select the dropdown arrow [⌄] to choose which plan you wish to display.

3.   You can change how your current plan displays on the screen by selecting the **Change View** button.

4.   To print a copy of your plan, select the **Print this plan to PDF button** in the top right hand corner of the screen.

View My Plan: Personal Details

The **Personal Details** section of your plan displays your NDIS Number, the displayed plan start date, the plan review due date and the length of the plan in months.

A blue information message displays at the top of the screen advising you that the NDIA will be in contact with you about your plan review before the plan review due date. Please contact the NDIS if you have any changes to your circumstances, which could change the supports you need to be included in your plan.


Personal Details

ⓘ   A National Disability Insurance Agency (NDIA) representative will contact me about my plan review before: 11 July 2019

NDIS Number	556699887
NDIS plan start date	11 July 2018
NDIS plan review due date	11 July 2019
Plan Length (months)	12

Use the **Open Section** to view the selected plan's details under each of the headings and **Close Section** to close.

1.   The **Participant Profile** outlines key information about you, such as your date of birth, current contact details, your statement about yourself (About me) and My family and friends.

EMILY's Profile   ⌃ Close Section

What I want people to know about me

Date of birth	01 January 1990
Current contact details	15 TAY ST WATSON ACT 2602 Australia
About me	I live with my Mum (Samantha), Dad (Darrin), younger brother (Jack) and younger sister (Lily) in our family home in the Western Suburbs of Melbourne. I like spending time with my pets including the family cat (Missy) and Guinea Pig (Joe). I have a big role in looking after them and have to feed them in the morning and clean them out sometimes. My Mum and Dad encourage me to learn new things and help me with the things I find difficult like going to the shops to buy things for dinner, cooking, managing my money and remembering all the things I need to do to get ready for the day. I enjoy craft and spending time with my friends. We like to go the movies, markets or out for dinner. I would like to go on a holiday with them one day. The most important things in my life are my family, pets, friends and being able to spend my weekends doing things that I enjoy. Every morning during the week I wake at around 7am and my mum supports me by making sure I am ready to leave the house and catch the bus to work by 8:30am. I work at a cafe and really like it. The best bit is that I can try lots of different things during the day. I was really excited when I got a promotion earlier this year. I work hard every day and am usually tired when I get home. Sometimes I help Dad prepare the family meal before relaxing on my computer. I really using the computer and people tell me I am good at it.
My family and friends	My Mum and Dad support me daily

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2. The **Participant Goals** outlines the goals you have chosen to include in your plan. The funding in your plan is intended to help you to achieve these goals.

EMILY's Goals ⌃ Close Section

This is what I want to achieve

Short-term goal

During this plan I would like to learn how manage my own money so that I can pay for things myself and save money so that I can go on holiday with my friends.

Medium or long-term goal

Develop a budget that I can follow that will allow me to save money

Medium or long-term goal

Learn job searching skills

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3. The **Participant Funded Supports** outlines the supports funded by the NDIS to help you achieve your goals. The total funded supports is displayed as well as how this funding amount is divided across the support categories (or budgets) in your plan.

EMILY's Funded Supports ⌃ Close Section

My funded supports can help me achieve my goals

Managing my NDIS funding - Help ?

Total Funded Supports $12,217.41

For 01 November 2018 - 01 November 2019

Core Supports

Core supports help with my everyday activities, my current disability related needs and to work towards my goals.

My Core Supports funding can be used flexibly across the following sub categories:

- **Assistance with Daily Life (Daily Activities)**
  For example, assistance with everyday needs, household cleaning and/or yard maintenance.
- **Consumables**
  For example, continence products or low cost assistive technology and equipment to improve independence and/or mobility.
- **Assistance with Social and Community Participation**
  For example, a support worker to assist you to participate in social and community activities.
- **Transport**
  For example, helps you to travel to work or other places that will help you achieve the goals in your plan. There may be instances where you do not have flexibility in your transport funding (your NDIS Contact can explain how you can use this funding).

Core Supports	Budget
My Core Supports funding will be: • $60,000.00 NDIA-managed	$60,000.00
Transport Includes support to get to work or travel to participate in social and community activities. **My Transport funding will be:** Paid as fortnightly instalments into my nominated bank account	$1,000.00
Total Core Supports	$61,000.00

Capacity Building Supports

My Capacity Building supports are intended to build my independence and reduce my need for the same level of support into the future. My progress and outcomes from these supports will be shared at each plan review.

Unlike my Core Supports budget, my Capacity Building Supports budget cannot be moved from one support category to another. Funding can only be used to purchase approved individual supports that fall within that Capacity Building category.

My Capacity Building funding can be spent in the following ways:

Capacity Building Supports	Budget
Improved daily living (CB Daily Activity) My Improved daily living (CB Daily Activity) funding will be: NDIA-managed	$2,000.00
Improved relationships (CB Relationships) My Improved relationships (CB Relationships) funding will be: NDIA-managed	$2,000.00
Finding and keeping a job (CB Employment) My Finding and keeping a job (CB Employment) funding will be: NDIA-managed	$2,000.00
Increased social and community participation (CB Social, Community, Civic) My Increased social and community participation (CB Social, Community, Civic) funding will be: NDIA-managed	$2,000.00
Support Coordination My Support Coordination funding will be: NDIA-managed	$20,000.00

Capital Supports

Capital supports include higher-cost pieces of assistive technology, equipment and home or vehicle modifications and Specialist Disability Accommodation. Capital supports funding cannot be used to pay for anything else.

My Capital Supports funding can be spent in the following ways:

Capital Supports	Budget
Assistive Technology My Assistive Technology funding will be: NDIA-managed	$20,000.00
Home Modifications My Home Modifications funding will be: NDIA-managed	$20,000.00
Total Capital Supports	$40,000.00

Note: Any items that require a quote will display as 'Quote required' on your plan until a quote is approved by the NDIA. Once approved, the final quoted amount will display.

4. The **Find out more** section displays information about who to contact if you need further information regarding your plan. Also outlined here is the due date of your next plan review, what to do if something important changes in your life that may impact your current plan and an explanation of Booklet 3 – Using your NDIS Plan; which is a booklet to explain your NDIS plan, how to use your funding and work towards your goals.

Find out more

^ Close Section

Who to contact if I need information or help with my plan

My next plan review due date	11 July 2019 A National Disability Insurance Agency (NDIA) representative will contact me about my plan review before my plan review date.
Booklet 3 - Using your NDIS plan	I can refer to Booklet 3 to help me understand my NDIS plan and how to use funding, arrange supports and services and work toward my goals. It will also help me review my goals and prepare for my plan to be reviewed. If I do not have a copy, I can ask my NDIS contact or visit the NDIS website.
Important changes	If something important changes or is going to change (for example, I move house, start work or school, if I get or may get compensation relating to an injury, or if my goals change) I will notify my NDIS contact.

For general enquiries, contact the NDIA

Call NDIA	1800 800 110
If I use a TTY	1800 555 677 and ask for 1800 800 110
If I use Speak and Listen (speech-to-speech relay)	1800 555 727 and ask for 1800 800 110
If I use the National Relay Service	http://relayservice.gov.au ⬀ and ask for 1800 800 110
If I need help with English	TIS 131 450

⌄ Open all sections   ^ Close all sections

Note: the portal will display your plan in the default plan view, to change views Select Change View as discussed above.

5. Select **My Plan** to navigate back to the homepage.

Home / My Plan / View

View My Plan (Change View)

If you have selected the **Change View** button in **My Plan** the below screens will display.

Selecting **View My Plan** enables you to view the details of your approved plan.

This includes the information you have discussed with the NDIS to develop your plan.
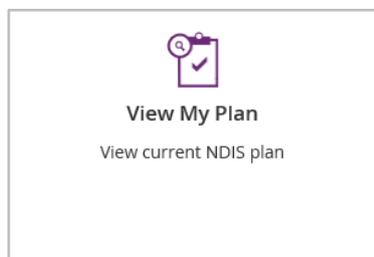
View My Plan
View current NDIS plan

1. To print a copy of your plan, select the **Print this plan to PDF** button in the top right hand corner of the screen.
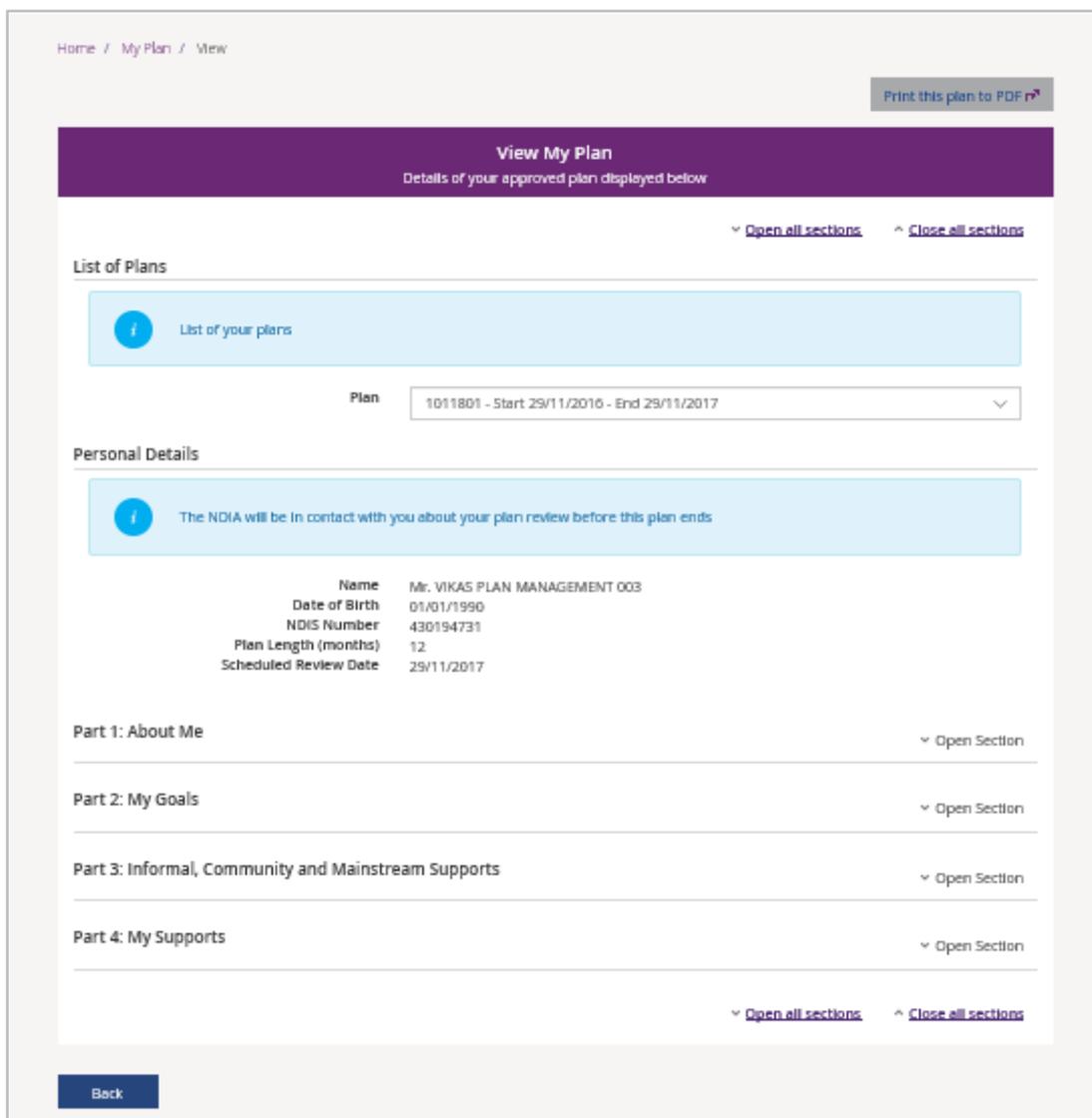
2. A list of your current and previous plans are available at the top of this window, including the start and end dates of your plans.
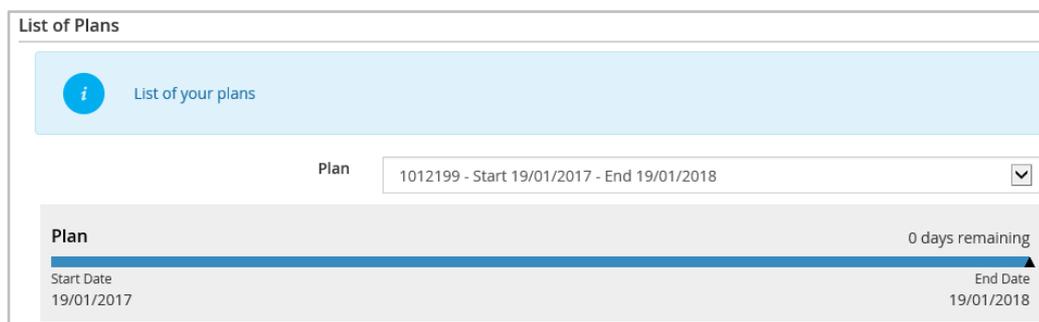
3. Select the dropdown arrow to choose which plan you wish to display.

Personal Details

The **Personal Details** section confirms your name, date of birth, NDIS number, current plan length (calculated in months) and the scheduled review date of your plan.

There is an important note advising you the NDIA will be in contact with you about your plan review before your plan ends.

Please contact the NDIS if you have any changes to your circumstances, which could change the supports you need in your plan.
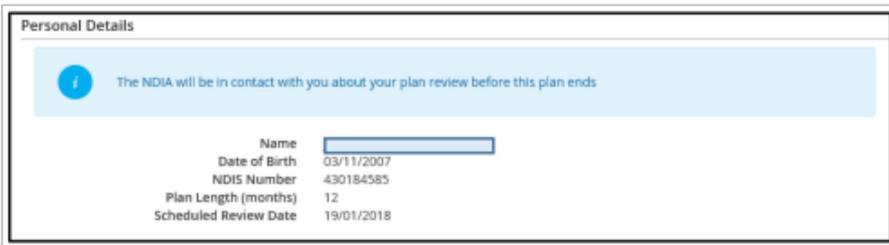
Use the **Open Section** to view details under each of the headings and **Close Section** to close.

6. The **Part 1: About Me** outlines information from your plan that relates to your living arrangements, relationships, supports and daily life.

7. The **Part 2: My Goals** outlines the goals you have chosen to include in your plan and will be summarised under the **My Goals** section.

   The funding in your plan is intended to help you to achieve these goals.

8. The **Part 3: Informal, Community and Mainstream Supports** window shows detailed information about the support type, description, whether the support is current or new, the frequency, the related goal/s and the support categories. These details should reflect what you have discussed with your planner.

9. The **Part 4: My Supports** outlines all your funded supports against the support type or category.

Part 4: My Supports			⌃ Close Section
Category	**Item**	**Item Budget**	**Category Budget ($)**
Assistive Technology			$750.00
CB Choice & Control			$12,749.42
	financial and service intermediary set up costs	$321.18	
	financial intermediary - set up costs	$428.24	
Consumables			$3,350.00
	adult absorbent pull up or brief 6/day- annual supply	$3,350.00	
Daily Activities			$4,457.30
	house and/or yard maintenance	$4,457.30	
	assistance dog	Quote required	
Social,Community and Civic Participation			$2,053.22
	group based activities in a centre - core	$2,053.22	
Support Coordination			$2,000.00
	training in planning and plan management	$55.07	
Transport			$1,250.00
Total:			**$26,609.94**

> ⓘ Support budget may contain offset amounts from Payment Request that have been cancelled.

Note: Quoted items will display as 'Quote required' on your plan until the quote is approved. Once the quote is approved the quoted amount will display on the plan.

My Helpful Documents

The **My Helpful Documents** function is currently under development and will be available soon.

My Helpful Documents
View and save NDIA factsheets and documents
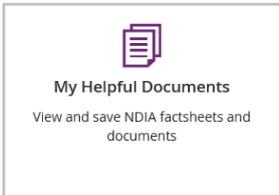
My Support Documents

You can use this function to view a summary of your funded support budget. This is based on information in your current NDIS Plan and will show your approved funds, funds spent, and funds remaining.


My Support Budget
View approved support budget
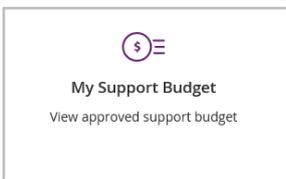
This budget is for the entire duration of the plan. The table and chart only reflect payments which have been paid. These figures do not include Payment Requests which have been submitted, but not yet processed.

1. Select **My Support Budget** from the **My Plan** page.

My Support Budget
Below is a summary of your approved plan budget for your current plan

79%

21%

■ Funds Spent
■ Funds Remaining

Funds Breakdown

Approved Support Budget	Approved Funds	Funds Spent	Funds Remaining
CB Daily Activity	$5,536.85	$1,740.00	$3,796.85
Core *	$837.02	$0.00	$837.02
CB Health & Wellbeing	$2,024.40	$0.00	$2,024.40
Totals	$8,398.27	$1,740.00	$6,658.27

Note: Core consists of Consumables, Daily Activities, Social and Community and Civic Participation Categories only.

Back

2. When you Select **funds breakdown** [Funds Breakdown] you will see a clearer summary of what funds you have spent and what funds are remaining in each category.


3. Select **My Plan** to navigate back to the main page [Home / My Plan / View].

My Referrals

You can use this function to view any current referrals you have.
Referrals are entered during the planning process by the person developing your plan.

My Referrals
View my referrals to providers or community groups

1. Select **My Referrals** on the **My Plan** page.
Any current referrals are displayed.

My Referrals
Below is a list of your referrals

Search for a Referral

Search by: * [All Referrals ▾]   [Search]

Search Results (10 records found)

Provider Name (NDIS Number)	Referral Type	Reason	Area of Referral	Created at
Manishs Wheelchairs (4050003341)	Provider	Plan-Review	Other	06/09/2017
Manishs Wheelchairs (4050003341)	Provider	Plan-Implementation		05/09/2017
Manishs Wheelchairs (4050003341)	Provider	ILC Supports	Transport Services	05/09/2017
Daniels Wheelchairs (4050003318)	Provider	Plan-Implementation	Specialist Assessmt-	28/10/2016
Daniels Wheelchairs (4050003318)	Provider	Plan-Review	ILC/LAC Service	28/10/2016
Daniels Wheelchairs (4050003318)	Provider	ILC Supports	Employment	28/10/2016
Manishs Wheelchairs (4050003341)	Provider	Plan-Implementation	Transport Services	31/08/2016
Manishs Wheelchairs (4050003341)	Provider	Pre-Planning	Employment	31/08/2016
Daniels Wheelchairs (4050003318)	Provider	Plan-Review	Specialist Assessmt-	31/08/2016
Daniels Wheelchairs (4050003318)	Provider	Plan-Implementation	Transport Services	31/08/2016

[Back]

**2.** Select **Home** to navigate back to the homepage Home / My Plan / View .

My Appointments

The **My Appointments** function is currently under development and will be available soon.

My Appointments
View my upcoming appointments
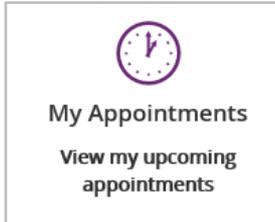
My Document Upload

This is where you can send copies of documents to the NDIS.

Note: Once you have uploaded a document it cannot be deleted from the system.

My Document Upload
Upload my supporting documents
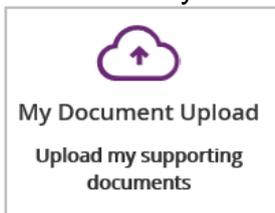
1. Select the **My Document Upload** tile on the homepage.

2. The **Document Upload** page displays.
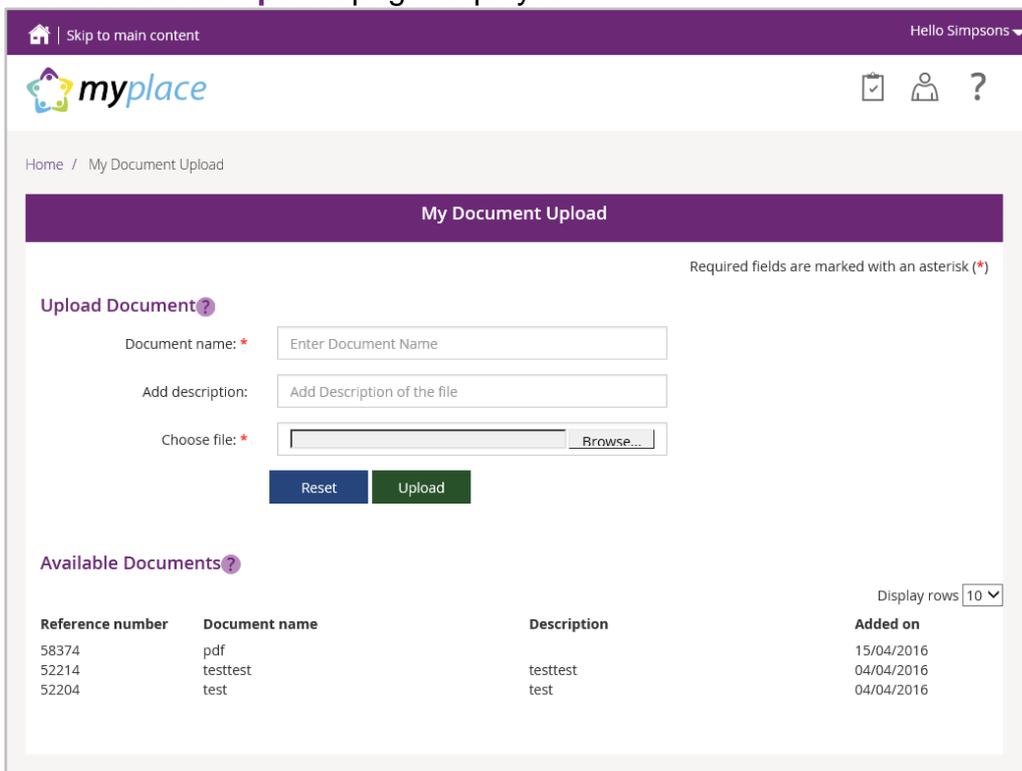
Hello Simpsons

myplace

Home / My Document Upload

My Document Upload

Required fields are marked with an asterisk (*)

Upload Document?

Document name: * [Enter Document Name]

Add description: [Add Description of the file]

Choose file: * [_____] Browse...

[Reset] [Upload]

Available Documents?

Display rows 10

Reference number	Document name	Description	Added on
58374	pdf		15/04/2016
52214	testtest	testtest	04/04/2016
52204	test	test	04/04/2016

3. At **Document name**, type the name of the document. Ensure the document name is meaningful and captures the main purpose of the document.

4. Type a description of the file in the **Add description** field. Ensure the description is connected to the content within the document.

5. Select **Browse** to find the file you want to upload off your computer.

6. Once you have selected the file, Select **Upload** to send the document to the NDIS.

The document is now available to view by NDIS Delegates in your secure file.

Note: If the matter relating to your document needs to be actioned urgently by an NDIA staff member or your Local Area Coordinator (LAC), please contact the NDIS on **1800 800 110** in normal business hours, to let us know you have uploaded the document(s), if possible.

myGov Inbox

You can view all email messages from the NDIS in your myGov Inbox.

Note: You will only see emails here if you have requested email as your preferred method of receiving information from the NDIS. To update your preferred correspondence method, please go to My Contact Details.

1. Select the **myGov Inbox** tile.

2. Your inbox opens and displays your incoming messages.
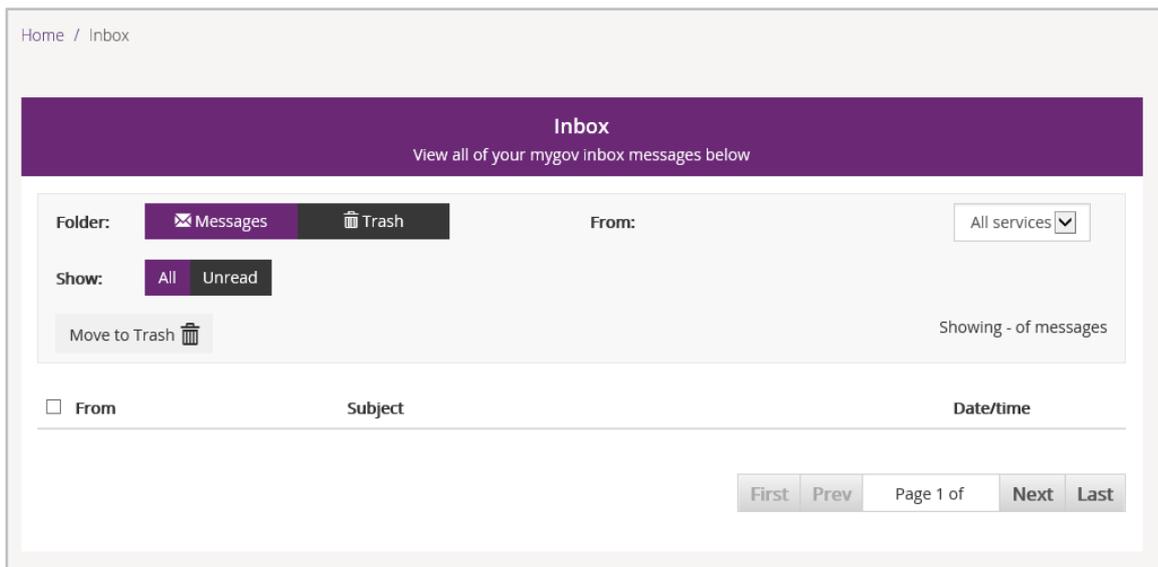
My Service Booking

Note: Any supports you are self-managing do not require a service booking.
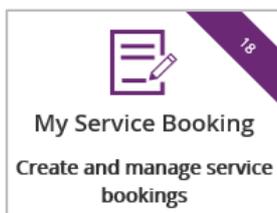
As a participant you are able to choose who provides your supports and how they are provided. If you choose for the agency to pay your providers a service booking will be created to link the supports in your plan to your chosen providers.

You can create your own service bookings as a participant, or this can also be done by a nominee, or a provider with your consent.

The service booking will show the type of support you need and how long you need it for. It will also confirm there is funding in your plan to pay for these supports.

Your providers will request payment directly from the Agency for the supports outlined in your service bookings.

Note: A service booking is different to a service agreement. A service agreement is an agreement between a participant and a provider. All participants should have service agreements with their providers, as the agreement sets out the expectations for the service to be delivered. Service agreements will not appear in the NDIS myplace portal.

What if I have a Plan Management Provider?

If you choose to have a Plan Manager to help you to pay your providers, a standard service booking will be created with the provider of the plan management supports. 'Plan-Managed' service bookings will be created for the supports that are Plan-Managed. The Plan Manager will then be able to pay your chosen providers.

Create a Service Booking

1. Select **My Service Booking** tile on the homepage.

2. Select **Add My Service Booking** tile on the **Service Bookings** page.

    Add My Service Booking
   Create new service booking with a Provider

3. Select **Find a Provider**.

    Skip to main content   Hello Jeffrey ▾

    myplace   ☑ 👤 ?

    Home / My Service Booking / Add

    Add My Service Booking
    Use this screen to add a service booking starting with finding a provider

    Required fields are marked with an asterisk (*)

    To proceed choose a provider using Find Provider button   Find a Provider

    Cancel   Next
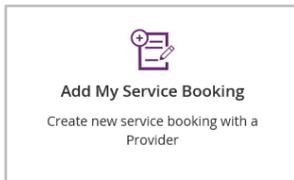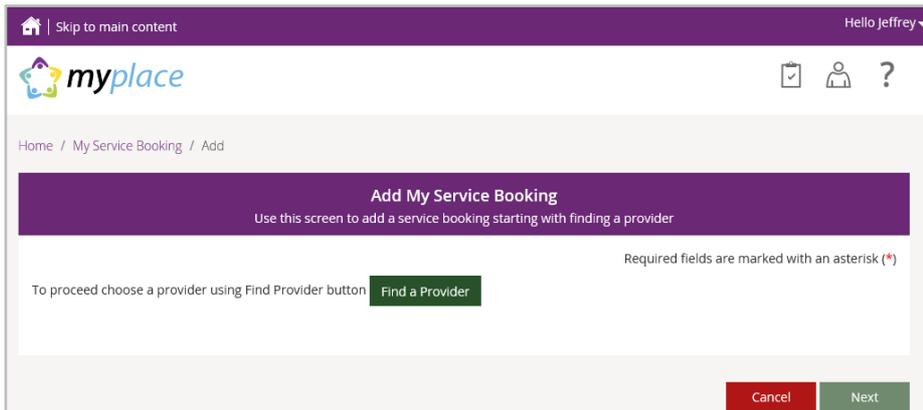
4. This opens the **Provider Finder** screen. You can also get here from the **Provider Finder** tile on the home page. The provider finder screen will show you a list of providers you have recently engaged with.

    Home / Provider Finder

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

    I am looking for
    My recent providers   A new provider or service

    Recently engaged providers
    This list shows the last 5 providers that you have had a service booking with. Please note that your providers are listed by their organisations name.   Show Map

    Manishs Wheelchairs
    03 12345678
    Visit provider website ☑   View Details

    PROVIDER TESTq   View Details

    Peggy and Finn   View Details

    Daniels Wheelchairs   View Details

5. You can view the location of these providers by selecting **Show Map.**   Show Map

6. You can view more details about these providers by selecting **View Details.**

    View Details
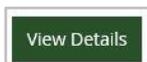
7. You are able to search for a provider by selecting **A new provider or service**.

    I am looking for
    My recent providers   A new provider or service
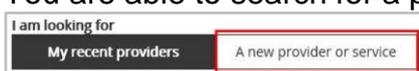
8. The search options will display.
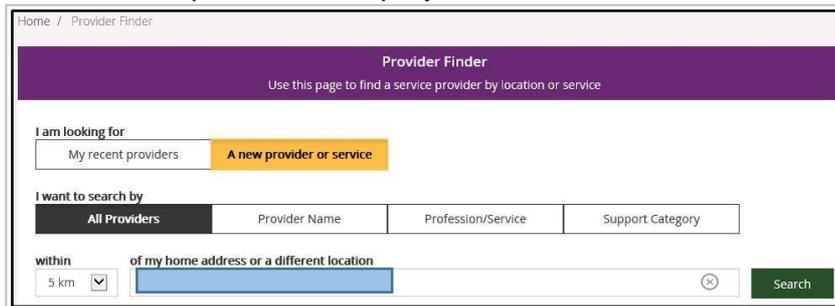
You have the option to search by:

- ◗ **All providers-** all providers within the selected distance to your address will be displayed.

- ◗ **Provider name-** when selecting this option you will be able to enter the name of the provider you are looking for, in a box that will appear under the provider name tab.

- ◗ **Profession/service-** when selecting this option you will be able to choose the profession/service you are looking for from a drop down menu. The profession/service options can be found by selecting the arrow in the right hand side of the box which will appear under the professional/service tab. You are also able to search based on an intuitive keyword search using this search option.

- ◗ **Support Category-** when selecting this option you will be able to choose the support category you are looking for from a drop down menu. The support category options can be found by selecting the arrow in the right hand side of the box which will appear under the support category tab.

If you live in a remote area you are able to search for providers outside a 50km search area by selecting **View closest providers.**
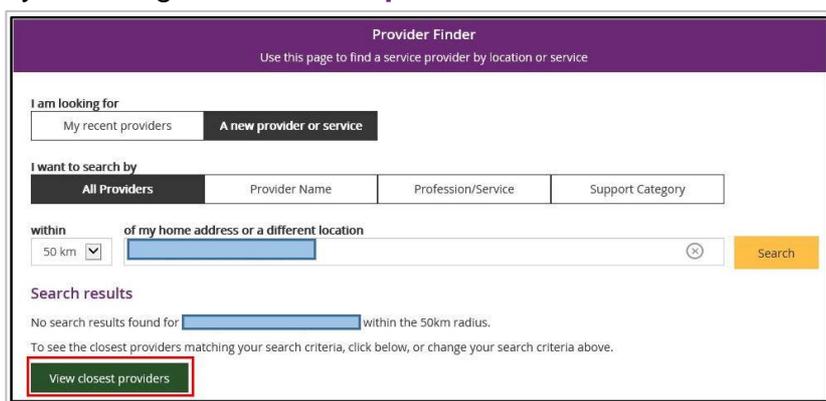
Note: For participants living in populated areas.

If you search for a provider using **Address** and **within** fields, you may find there are limitations in the distance. The search only allows you to search up to 50 km in the **within** field, from the default participant address (populated under **address**). This may result in one of your preferred providers not being found.

This may arise if you are living more than 50km away from the provider or if the provider's registered address is more than 50km away from the address in **Address** field.

In these situations changing the **Address** to an address closer to the preferred provider location or checking with the provider and entering their registered address in the **Address** field will enable you to successfully find the provider.

Remember to check the provider you select is registered with the NDIS to provide the type of support outlined in your plan.

9. Select **Search**.

Search

10. The results of the search display.

> **Search results**
>
> 1 out of 1 results for providers matching your search criteria.
> Showing results for [_____] with 5km radius.
>
> Filters   Show Map

11. You are able to apply filters to your search results, in order to narrow down your results.

> Filters
>
> **Filter by**   X
>
> ☐ Accepting new referrals
>
> ☐ Open extended hours on weekdays
>
> ☐ Open on weekends
>
> Apply
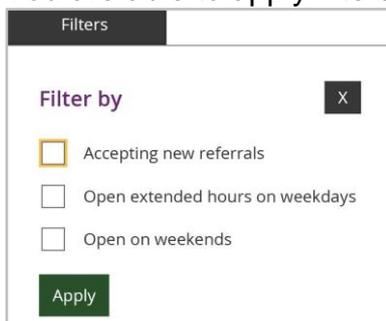
The following filters can be applied to your search:

▶ Accepting new referrals
▶ Open extended hours on weekdays
▶ Open on weekends

12. Selecting **Show Map** will enable you to see where the provider is located in comparison to the address you have searched from.

Show Map

13. If there is more than one page of results use the buttons to look at all the providers.

Search results

10 out of 83 results for providers matching your search criteria and applied filter(s).
Showing results for ▭ with 50km radius.

| Filters | | First | Previous | Page | 1 | of 9 | Next | Last | | Show Map |

14. Select **View Details** to see more information about the provider and the type of support they can provide.

15. The details of the provider will display with the following:

- ▶ **Organisational name** – the provider business name.
- ▶ **Contact person** - the name of who you can speak within the organisation.
- ▶ **Contact details** - including contact phone numbers and email addresses.
- ▶ **Address** – the street address of the provider.
- ▶ **Outlet status** - this tells you if the provider is able to take referrals.
- ▶ **Services provided** - a list of all services provided is listed here.
- ▶ **Operating hours** - details of the days and times the provider is open for business.

Provider Details

View details of the selected provider

< Back to search results

Manish's Wheelchairs Geelong

Organisation Name
Manishs Wheelchairs

Outlet Status
Accepting Referrals

Contact Person
Manish R

Contact Details
0353000000
Visit provider website ↗

Address

Services Provided
Disability Support Worker
Welfare Worker

< Back to search results

Operating Hours		
Day	Start Time	End Time
Sunday	Closed	Closed
Monday	09:00	17:00
Tuesday	09:00	17:00
Wednesday	09:00	17:00
Thursday	09:00	17:00
Friday	09:00	17:00
Saturday	Closed	Closed

Show Map   Create Service Booking

Note: If you would like to conduct another search, Select **Back to search results** at the top or bottom of the screen. This returns you to the **Provider Finder** screen, where you are able to complete another search.

16. Once you have found the right provider, Select **Create Service Booking** to make a booking with this provider.

Create Service Booking

17. Type in the **Start Date** and **End Date**, or select them using the calendar.
Note: these dates must be within the start and end dates of the current plan.
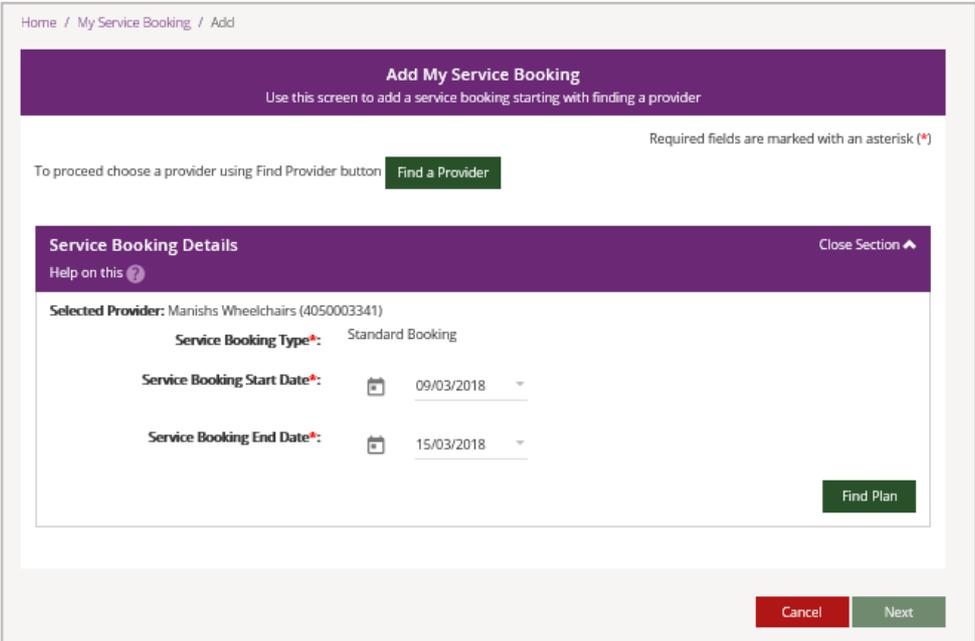
Home / My Service Booking / Add

Add My Service Booking
Use this screen to add a service booking starting with finding a provider

Required fields are marked with an asterisk (*)

To proceed choose a provider using Find Provider button   Find a Provider

Service Booking Details
Help on this ❓

Selected Provider: Manishs Wheelchairs (4050003341)
Service Booking Type*:   Standard Booking
Service Booking Start Date*:   📅   09/03/2018
Service Booking End Date*:   📅   15/03/2018

Find Plan

Cancel   Next

18. Select **Find Plan.**

Find Plan

19. Select the radio button next to the relevant plan under heading **Step 2: Select Plan.**
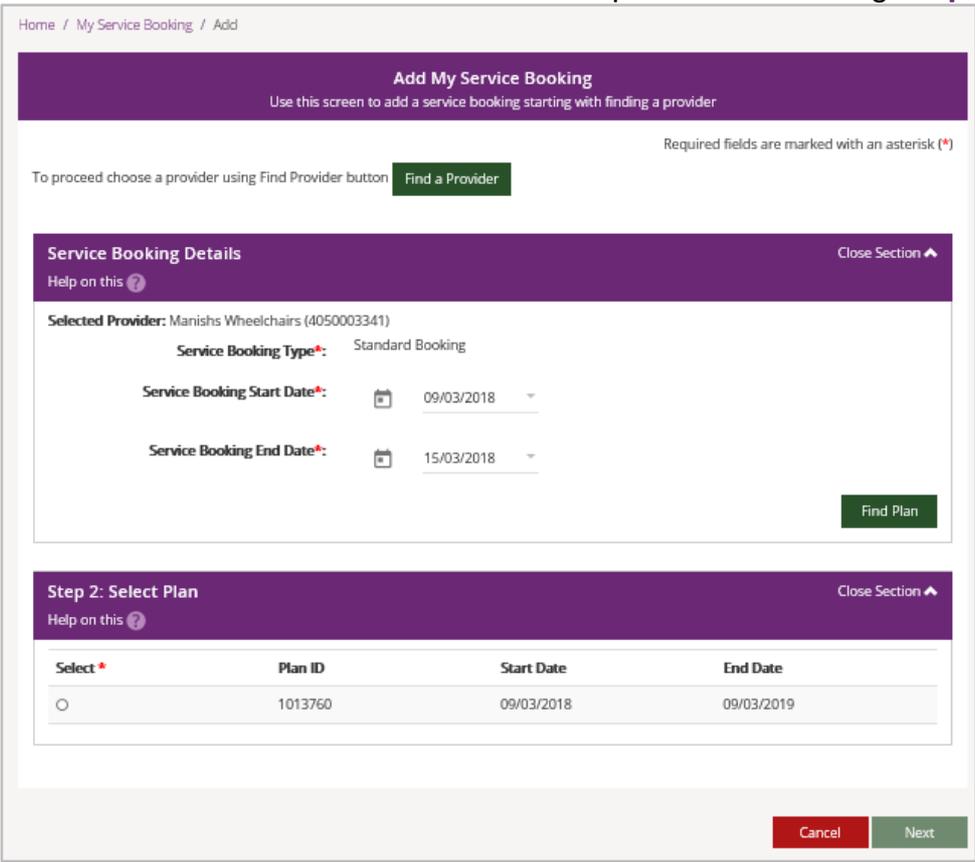
Home / My Service Booking / Add

Add My Service Booking
Use this screen to add a service booking starting with finding a provider

Required fields are marked with an asterisk (*)

To proceed choose a provider using Find Provider button   Find a Provider

Service Booking Details
Help on this ❓

Selected Provider: Manishs Wheelchairs (4050003341)
Service Booking Type*:   Standard Booking
Service Booking Start Date*:   📅   09/03/2018
Service Booking End Date*:   📅   15/03/2018

Find Plan

Step 2: Select Plan
Help on this ❓

Select *	Plan ID	Start Date	End Date
○	1013760	09/03/2018	09/03/2019

Cancel   Next

20. Select the **Support Budget** at **Step 3: Support Details**, shown under **Allocated Amount** and then Select **Add.**

21. The **Support Budget** displays the categories of funded supports in your NDIS Plan. The **Support Item Number** allows you to create the booking for a specific item within the support category selected.

    Note: If you want the one provider to manage all of your budget in the support category you do not need to point out the line item. Only one booking is required for the entire budget, or the portion you want that provider to manage. If you point at the **Item,** the **Allocated Amount** is the agreed rate. You will be asked to enter the quantity of services needed. If you have chosen to only enter the **Support Budget** or category, you can enter the overall budget you have agreed to pay in the **Allocated Amount** section.

22. To add more supports, repeat the above step.

23. The booking will appear in the Added Details section.

If all the information is correct, Select **Next**.

If not, Select the **Edit** link to amend it, or the **Remove** link to delete it and add it again.

24. A summary of supports are displayed. Notes may be added in the comments section.

25. Once confirmed all the information is correct, Select **Submit**.

26. A service booking confirmation message appears, you can select **View Service Bookings** to see the details of any newly created service bookings.

Home / My Service Booking / Add / Review / Confirmation

Confirmation

✓ Your Service booking has been successfully submitted.

View Service Bookings
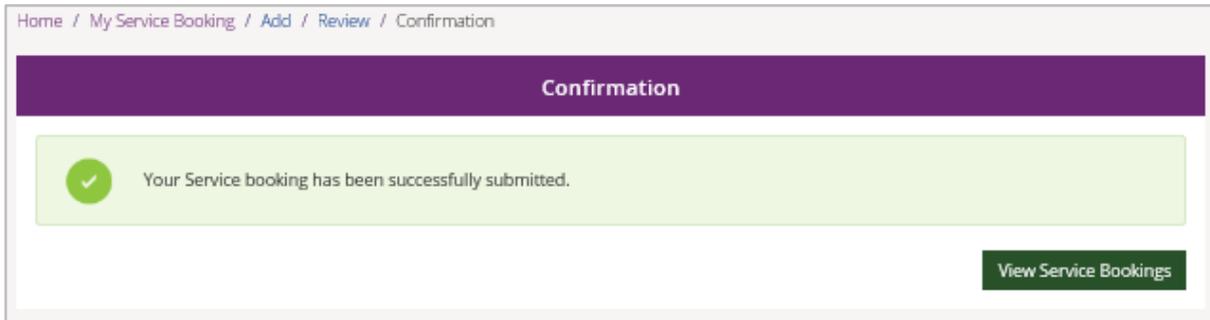
27. When the provider accepts the booking the status will show as **Active**.

Note: If the provider rejects the booking, the service booking status will show as **Rejected**. The rejection reason provided by the provider can be seen at the top of the **View Service Booking Details** screen.

View Service Booking Details Detailed view of the selected service booking

Service Booking Details

⚠ Your last service booking change has been rejected. The reason for rejection is "this is an explanation"

Provider Name (NDIS Number)	Type	Number	Start Date	End Date	Revised End Date	Total	In-Kind Program	Status
Hard 'Wheelbarrow (4050003397)	Standard Booking	50014165	06/07/2018	30/09/2018	-	$800.00	-	Active

Support Details

No.	Support Budget	Support Item Number	Support Item Name	Quantity	Revised Quantity	Allocated Amount (Unit Price)	Revised Amount	Remaining Amount
1	Support Coordination	07_001_0106 _8_3	Support Connection	16	-	$800.00	-	$800.00

Back   Request End Date Change   Request Update Allocation

View Existing Bookings

1. Select the **View My Service Booking** tile on the **Service Bookings** page.

View My Service Booking
View and manage existing service bookings
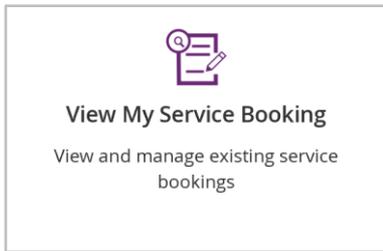
2. The list of service bookings display.

3. To expand the search criteria, Select the **Refine Search** drop down.

---

4. You have the option to include the following in your search:

   ◗ **Booking Number** – refers to the 8 digit service booking number.
   ◗ **Status** – refers to the service booking status, for example active/inactive, awaiting review, awaiting provider review, change awaiting provider, review change or rejected.
   ◗ **Initiated by** –who initiated the booking, for example, all, participant, provider or staff.

5. Select **Search**, your search results will appear.

6. You can sort your search results by selecting the **Sort By** drop down arrow, your options are:

   ◗ Initiated by
   ◗ Service Booking Number
   ◗ Service Booking Start Date
   ◗ Service Booking End date
   ◗ Submitted Date
   ◗ Service Booking Status

7. To view details of any item, Select **Service Booking Number**.

8. You are able to delete the service booking before it is accepted by the provider, by selecting **Delete**. Once a service booking has been accepted by the provider it cannot be deleted.

9. Once the **Delete** button has been selected you will receive the following warning message.

> **Warning:**
>
> You are about to delete this service booking. This will remove it from your list of service bookings permanently. The provider will not be able to provide services or request payment on this service booking. Do you agree to continue? Choose yes to delete or no to cancel this action.
>
> NO   YES

10. If you Select **Yes**, you will receive the following message confirming the service booking has been deleted.

> ✓   Service booking 50015058 has been deleted.

11. Select **My Service Booking** to navigate back to the main **Service Booking** page.

Edit a Service Bookings

You can change or end a service booking (with the status **Active**) if it was created by yourself or by your provider.

1. Select **View My Service Bookings** tile on the **Service Bookings** page.

2. Select **Service Booking Number** of the booking you want to edit.

Home / My Service Booking / Find

View My Service Bookings
View your existing Service Bookings

Required fields are marked with an asterisk (*)

Search for Service Booking
Help on this ?

Search by: Please select

Search Results

31 Results found   Sort By   Service Booking N

Service Booking Number	Service Booking Type	Provider Name (Registration Number)	Start Date	End Date	Submitted Date	Service Booking Status	Created By
50014413	Standard Booking	Manishs Wheelchairs (4050003341)	13/07/2018	27/07/2018	13/07/2018	Active	Participant

3. Select **Request Update Allocation.**

Request Update Allocation

4. The **Request Update Allocation** page displays.

5. Add the **Revised Quantity** and **Revised Unit Price**.

6. Select **Submit**.

7. A message displays at the top of the screen stating the details have been updated successfully.

8. Select **Back** to return to the **View My Service Bookings** page.

    [Back]

    The status of the service booking has changed to **Change Awaiting Provider Review**. This means the provider can accept or reject the changes you have made. If the provider accepts the changes, the status returns to **Active**.

    If your NDIS provider makes a change to your service booking, the following SMS notification will be sent to you:

    "Your NDIS Provider has updated your service booking (number). Please review the change and discuss with your provider if necessary. Do not reply by SMS"

Edit Service Booking

You can end a service booking with an active status that was created by the NDIS, your provider or yourself. As the participant, the portal will allow you to immediately end a service booking so the current status of the services being delivered by the provider is reflected.

1. Select **View My Service Bookings** tile on the **Service Bookings** page.

2. Select the Service Booking Number of the booking you wish to end.

Home / My Service Booking / Find

View My Service Bookings
View your existing Service Bookings

Required fields are marked with an asterisk (*)

Search for Service Booking

Help on this (?)

Search by: Please select   [v]

Search Results

31 Results found   Sort By   Service Booking N[v]

Service Booking Number	Service Booking Type	Provider Name (Registration Number)	Start Date	End Date	Submitted Date	Service Booking Status	Created By
50014413	Standard Booking	Manishs Wheelchairs (4050003341)	13/07/2018	27/07/2018	13/07/2018	Active	Participant

3. Select **Request End Date Change** to end the service booking.

4. Enter the **Service Booking End Date** and Select a **Reason for Change** from the drop down options.

5. Select **Submit**.

You will receive an alert message confirming your understanding of ending the service booking. If you want to proceed with ending the service booking Select **Yes**, if not Select **No**.

After your Provider accepts this update, Quantity, Allocated Amount (unit price) and End Date for this service booking cannot be changed again. You will not be able to receive supports through this service booking after 14/07/2018. Do you want to continue?

6. You will receive a message at the top of the screen confirming the details have now been successfully updated.

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

Provider Name (NDIS Number)	Type	Number	Start Date	End Date	Revised End Date	Total	In-Kind Program	Status
Manishs Wheelchairs (4050003341)	Standard Booking	50014413	13/07/2018	27/07/2018	-	$0.01	-	Change Awaiting Provider Review

Support Details

| No.	Support Budget	Support Item Number	Support Item Name	Quantity	Revised Quantity	Allocated Amount (Unit Price)	Revised Amount	Remaining Amount
1	Social,Community and Civic Participation	-	-	1	1	$0.01	$0.01	$0.01

Back

7. Select **Back** to return to the **View My Service Bookings** page.

Back

The status of the service booking has changed to **Change Awaiting Provider Review**. This means the provider can accept or reject the changes you have made. If the provider rejects your change for whatever reason, the status will show as **Active** and you will need to contact the provider directly to discuss. When the service booking ends the status will show as **Inactive**.

Provider Finder

The function of the **Provider Finder** was outlined in detail in the previous tile called My Service Booking.

Provider Finder
Find a provider close to you
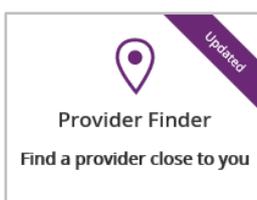
My Payment Request

You will need to create **Payment Requests** only if you are self-managing the funded supports in your NDIS Plan and you have an active bank account recorded by the NDIA.

1. Select **My Payment Request** on the myplace homepage.
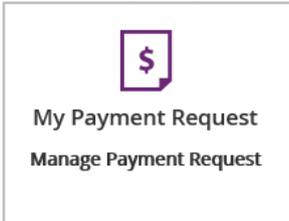
## Create a Payment Request (Claim)

1. Select **Add My Payment Request**.
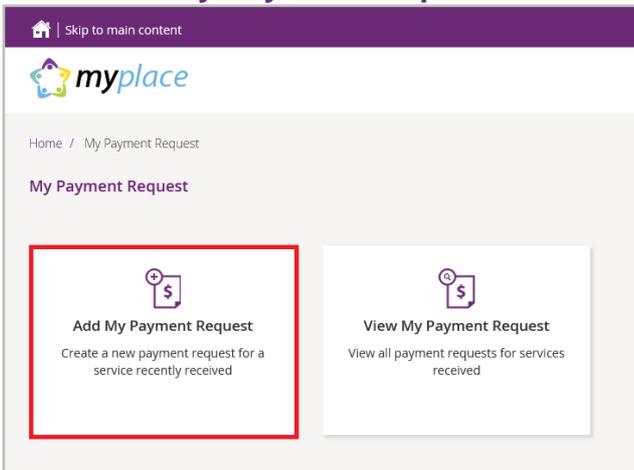
2. The **Add Payment Request** screen displays.

   Type in the details of your payment request, including the support start date, support end date, support category and the payment amount.

   For more than one payment request, select **Add Another**.

   Once you are complete, Select **Next**.

3. On the Preview screen, check the details displayed are correct.
Tick the declaration box and then Select **Submit**.

Home / My Payment Request / Add / Preview

Preview
Please review your payment request before submitting

Payment Request Details

Support Start Date:	Support End Date:	Support Category:
25/07/2018	27/07/2018	SOCIAL,COMMUNITY AND CIVIC PARTICIPATION
Claim Type:	Cancellation Reason:	Payment Amount:
Standard		$1.00

Payment Request Amount Summary

#	Support Category	Total Amount
1	SOCIAL,COMMUNITY AND CIVIC PARTICIPATION	$1.00
	Grand Total	$1.00

Declaration*
☐ The support category listed on this payment request will be recorded on my NDIA plan. I understand that I may be audited by the NDIA to verify the amounts submitted in this payment request. I certify that the information provided on this payment request is true and correct.

Back   Submit

4. The **Confirmation** screen displays, showing the details you entered.

Home / My Payment Request / Confirmation

Confirmation

✓   Your Payment Requests have been received

Payment Request Details

| #	Payment Request Number	Support Budget	Claim Type	Cancellation Reason	Support Start Date	Support End Date	Payment Total	Status	Rejection Reason
1	10119532	Social Community and Civic Participation	Standard		25/07/2018	27/07/2018	$1.00	Pending Payment	

View Payment Requests

5. Your Payment Request has been submitted.
You can now either return to the Home page or go to **View Payment Requests**.

View Payment Requests (Claims)

You can view the **Payment Requests** (claims) you have submitted, and also any periodic payments. Check here regularly to monitor the progress of your claims.

1. Select **My Payment Request** on the home page.

2. Select **View My Payment Request** on the **My Payment Request** screen.
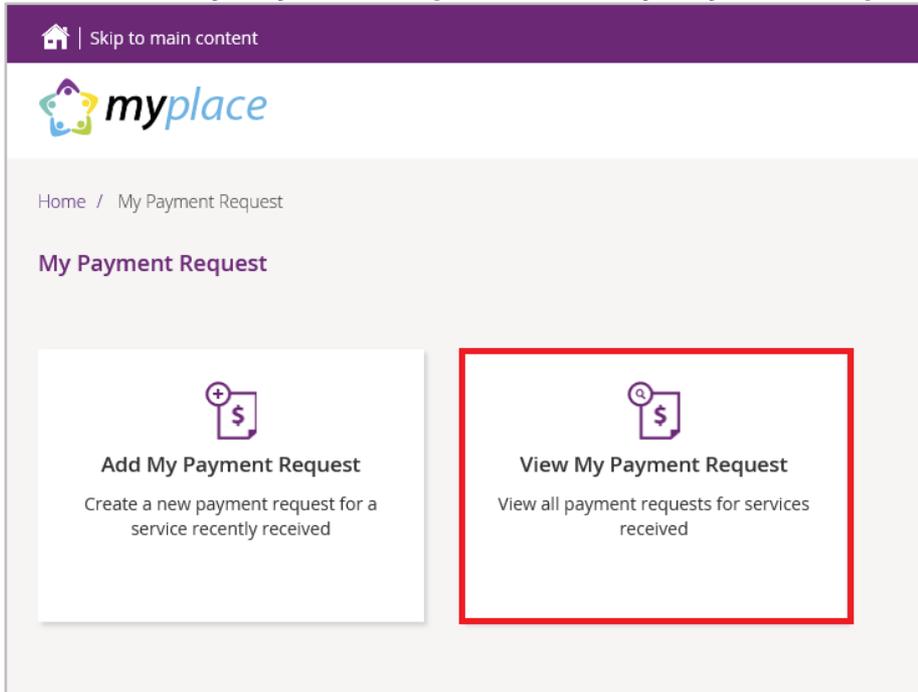
3. Choose the **Payment Request Type** from the drop down menu. The following steps are an example for submitted payment requests.
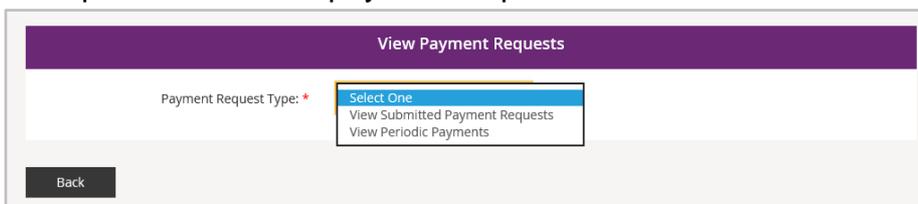
4. For **View Submitted Payment Requests**, the following screen displays.
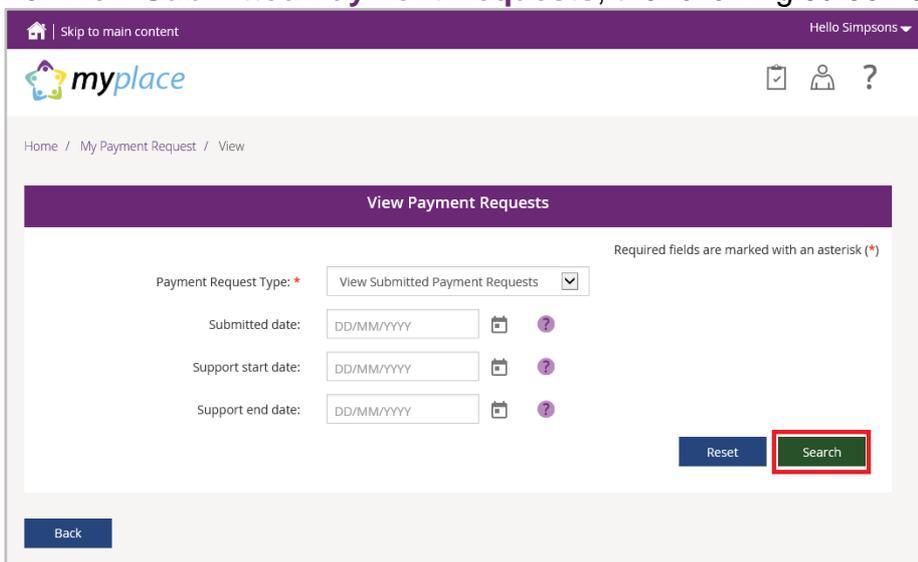
5. Select **Search** for a full list of all requests, or type in the relevant dates to view payments only within the selected time period. A list of your requests will be displayed.

Home / My Payment Request / View

View Payment Requests

Required fields are marked with an asterisk (*)

Payment Request Type: *   View Submitted Payment Requests ▾

Submitted date: DD/MM/YYYY 📅 ❓

Support start date: DD/MM/YYYY 📅 ❓

Support end date: DD/MM/YYYY 📅 ❓

Reset   Search

Search Results - Submitted Claim

3 results found

| Payment request number	Support category	Support start date	Support end date	Payment total	Submitted date	Payment request status
10006575	Daily Activities	06/06/2016	06/06/2016	$85.00	20/06/2016	Pending Payment
10007003	Support Coordination	03/07/2016	03/07/2016	$95.00	05/07/2016	Incomplete
10007004	Daily Activities	26/06/2016	26/06/2016	$105.00	05/07/2016	Pending Payment

Back

Cancel Payment Requests

You can cancel payment requests if they have the status of **Pending.**

1. Select **View My Payment Request** on the **My Payment Request** screen.

2. Search for the payment you wish to cancel, by entering either the submitted date, or support start date, or support end date or all of this information and Select **Search**.

   The search results will display.

3. Select the **Payment Request Number**.

2. A summary of your selected payment requests display.

3. Select **Cancel Payment**. A message will display.

4. Select **Yes** to cancel the payment request.

Are you sure you would like to cancel the selected payment?

YES   NO
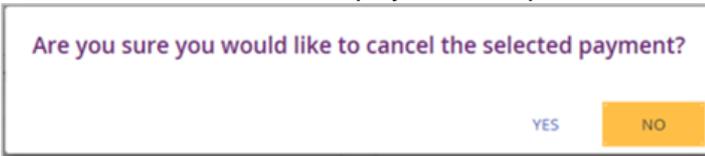
5. A confirmation message will display, confirming the payment request has been cancelled successfully.

✓ The payment request was cancelled successfully.

6. Select **Home** to return to the main homepage.

Home / My Payment Request / View

My Messages

You can send instant messages to your providers as long as they have been linked with your portal via a service booking.

1. Select the **My Messages** tile on the myplace home page.

talk

My Messages

Instant message your providers
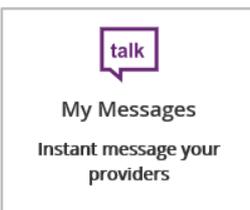
2. The **My Messages** page opens.

My Messages

My Provider List

Please select...   ?

Your Conversation

Can I please move my next session to the following week?
11:47 AM

My last session was very helpful, thank you.
11:15 AM

Conversations with

Flloyd, Pink Flloyd
Monday 11:15 AM
My last session was very helpful, thank you.
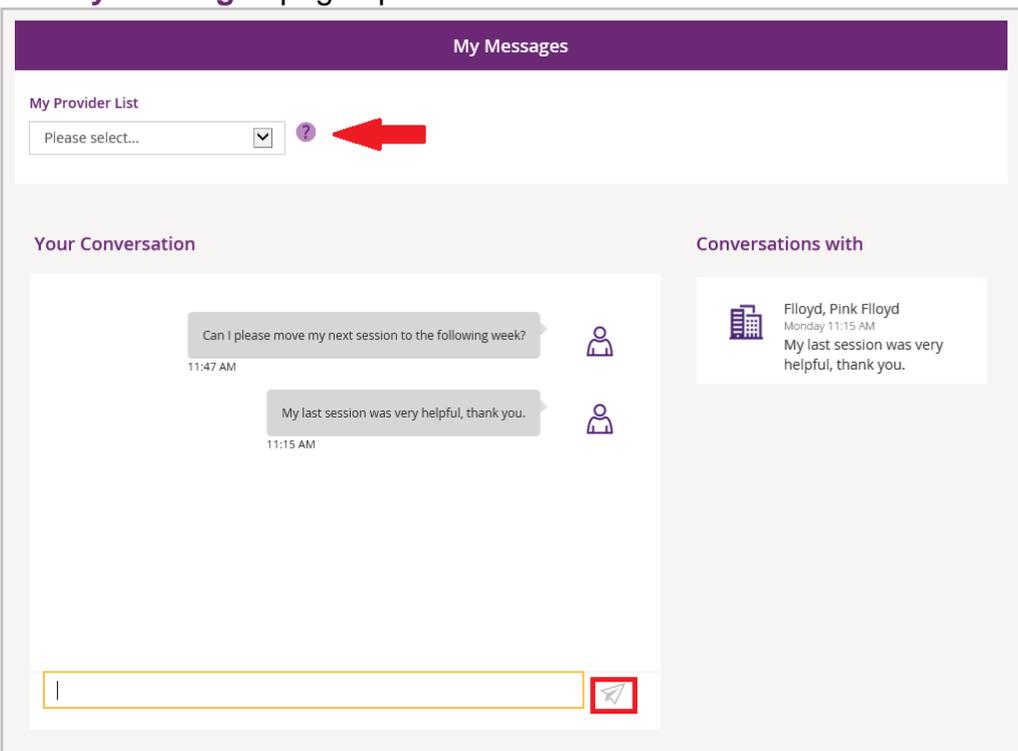
3. Select the provider from the drop down under **My Provider List**.

Type your message in the yellow box and Select the paper plane icon [✈] to send.

Note: Conversations (messages) will appear under the **'Conversations with'** tab. You can continue a conversation by selecting the providers' name.
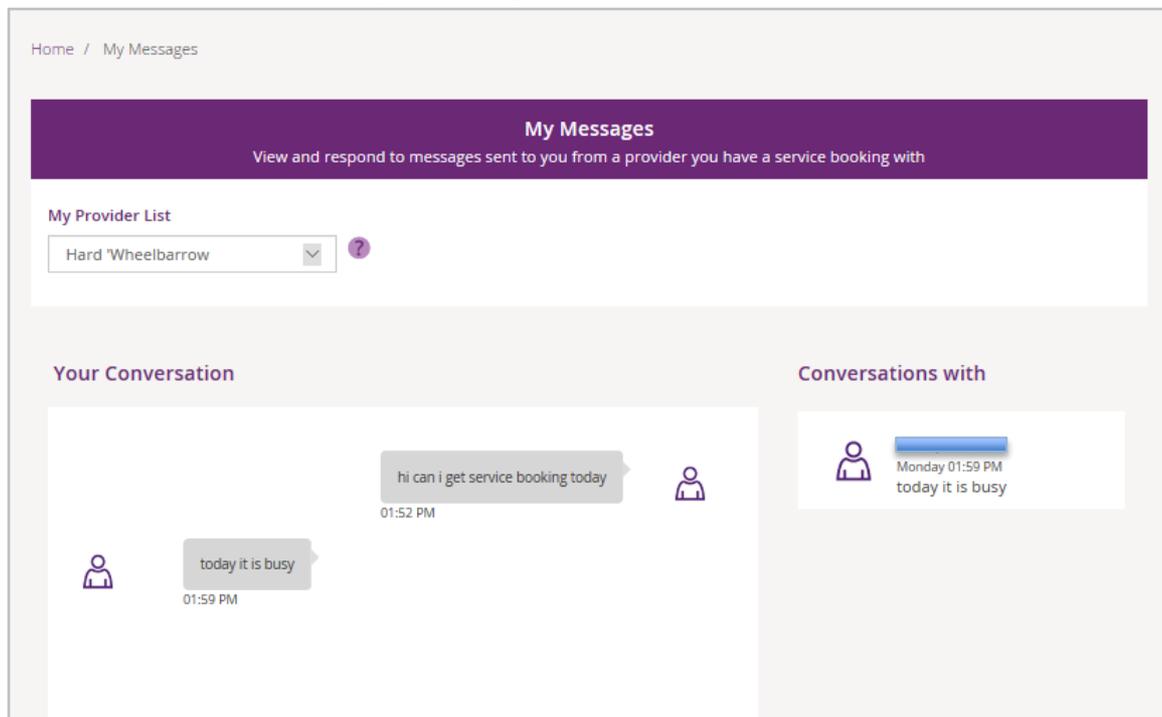
Logging out of myplace

Once you have completed all your tasks within **myplace** you can log out by selecting the down arrow next to your name at the top of the screen and Select **Logout**.

This will return you to the **NDIS website** if you signed in from there or your myGov home page if you had signed in from there.

Need more help?
Please direct any queries to the NDIS on **1800 800 110** or visit your local NDIS office.