

NDIS myplace portal

Step-by-step guide

September 2022

Table of Contents

Table of Contents	2
Changes from the last version	4
Introduction.....	4
What can you do in myplace?	4
Internet Browser Requirements	4
Before you start	4
Your first login	5
Logging into the portal after linking with myGov	8
The portal via myGov website.....	8
The portal via NDIS website	9
myplace portal home page.....	10
Tiles	11
Need more help?	13
Logging out of myplace.....	13
My Contact Details	14
About Me.....	15
How Can NDIA Contact Me?	15
How Can I Contact NDIA?	19
Share My Plan.....	22
My Bank Details.....	23
My Plan	24
View My Plan.....	25
View My Plan: Sections of the Plan.....	26
My Support Budget.....	30
View My Funding Report	32
Funds Breakdown.....	33
My Referrals.....	34
Provider Finder.....	35
Provider Search.....	35
Recent Providers	39
Document Upload.....	40
My Helpful Documents.....	42
myGov Inbox	43
My Service Booking.....	45
Service Bookings with different Funds Management	45
Add My Service Booking.....	46

View Existing Bookings.....	54
Refine Search.....	55
Edit a Service Booking.....	57
Change the dollar values in a Service Booking	57
End Service Booking	60
My Payment Request	63
Add My Payment Request	64
View My Payment Requests	67
Cancel Payment Requests	70
My Messages	73
Leaving Feedback	75
Logging out of myplace.....	76

Changes from the last version

The following updates have been made to the last published version of the myplace portal step-by-step guide:

- Updated myGov screenshots (pages 5, 6, 8 and 9)

Introduction

The **NDIS myplace portal (portal)** is a protected and secure website that can only be accessed using **myGov** account login credentials.

The portal has been developed to allow you greater control over managing your own information, plan details and plan budget.

Note: the data used in the screenshots throughout this guide are have been created for instructional purposes and do not represent actual participants.

What can you do in myplace?

As an 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;
- Request payment for self-managed supports;
- Search and locate registered service providers;
- Create and manage service bookings with registered service providers;
- Manage your consent to share all or part of your plan with service providers;
- Upload and view documents; Print your plan;
- View the Planning Support Booklets; and
- myGov Inbox

Internet Browser Requirements

The portal is accessed via the internet and has the following minimum browser requirements:

Internet Explorer 11

Microsoft Edge (Version 44)

Mozilla Firefox (Version 69)

Google Chrome (Version 77)

Safari 13 (Apple Only)

Before you start

To login to the portal, you will need a **myGov** account and an **NDIS activation code**.

You can request an activation code before you become a participant, or at any time, by contacting the NDIA on 1800 800 110.

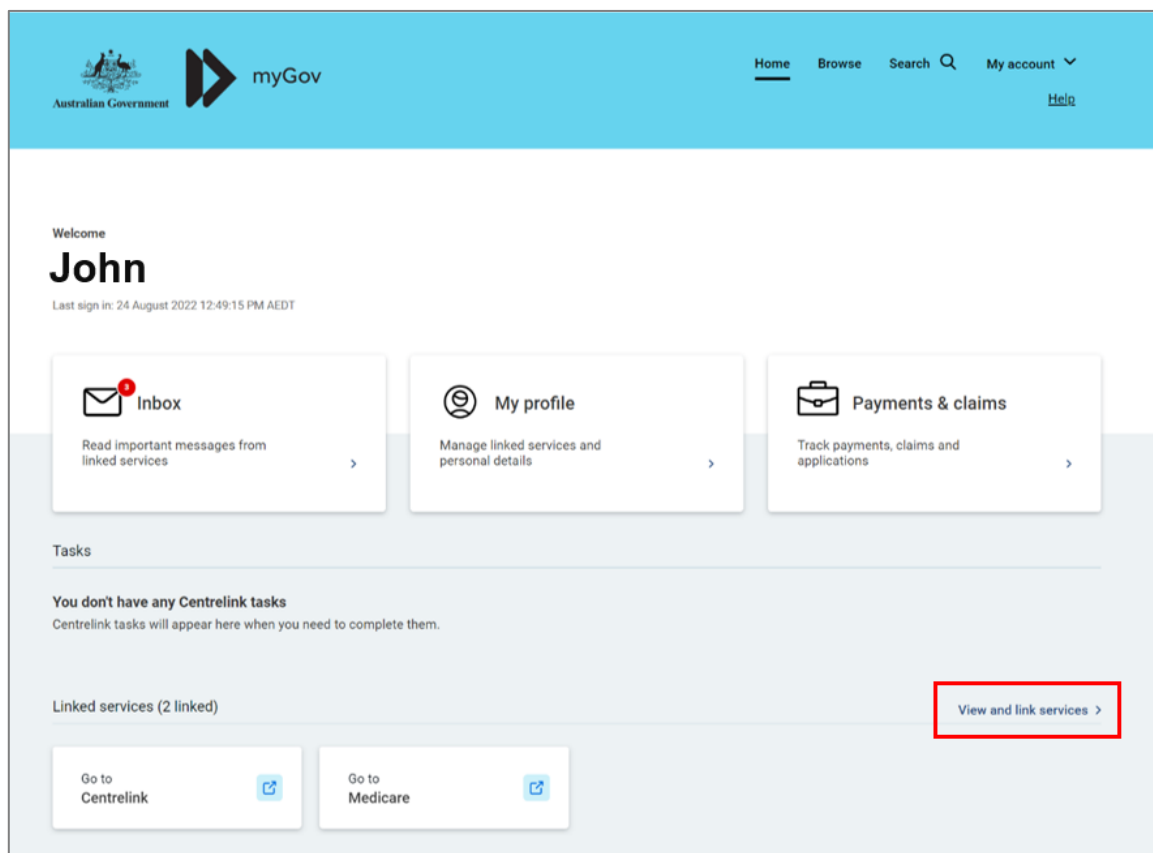
Your activation code is temporary and will expire after 10 days. If you lose your code or it expires, you can contact the NDIA and request a new code.

Before logging in for the first time, you will need to link your myGov account to the National Disability Insurance Scheme. You will then be required to input your activation code; the activation code is only required the first time you login to the portal.

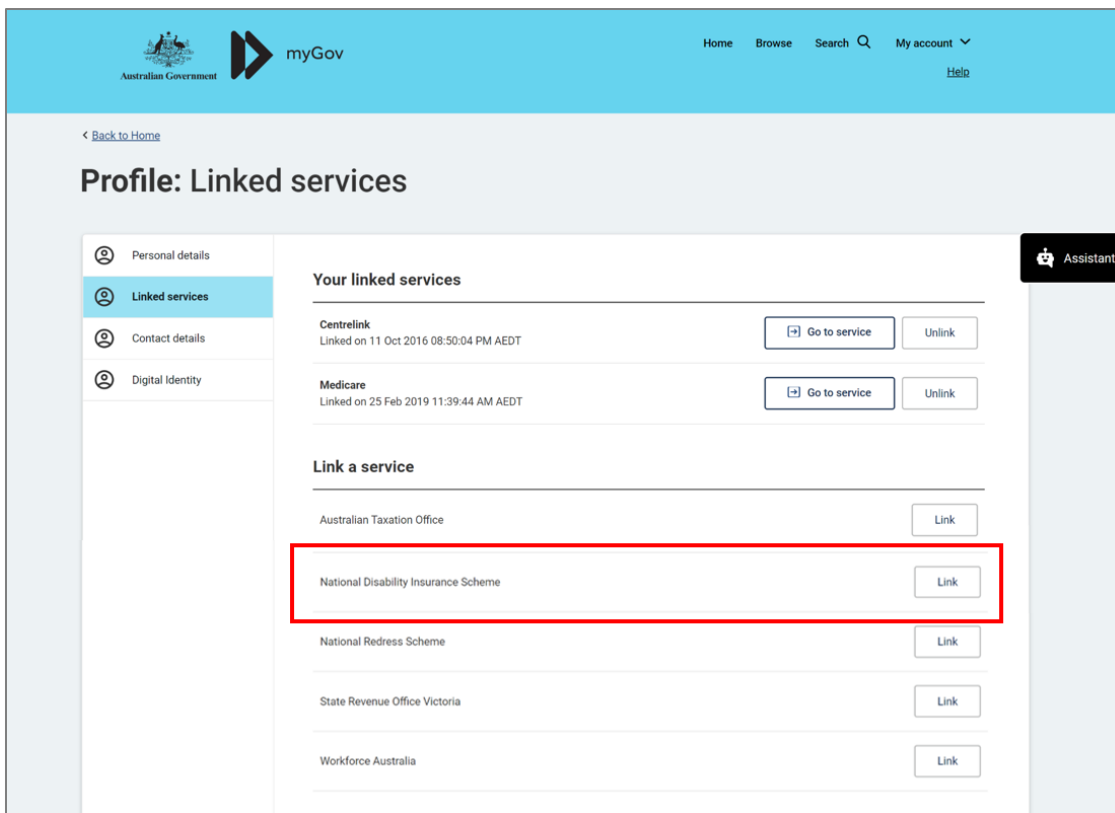
Note: Instructions for creating a myGov account can be found by typing the following address into your browser address bar: <https://my.gov.au/mygov/content/html/help.html>

Your first login

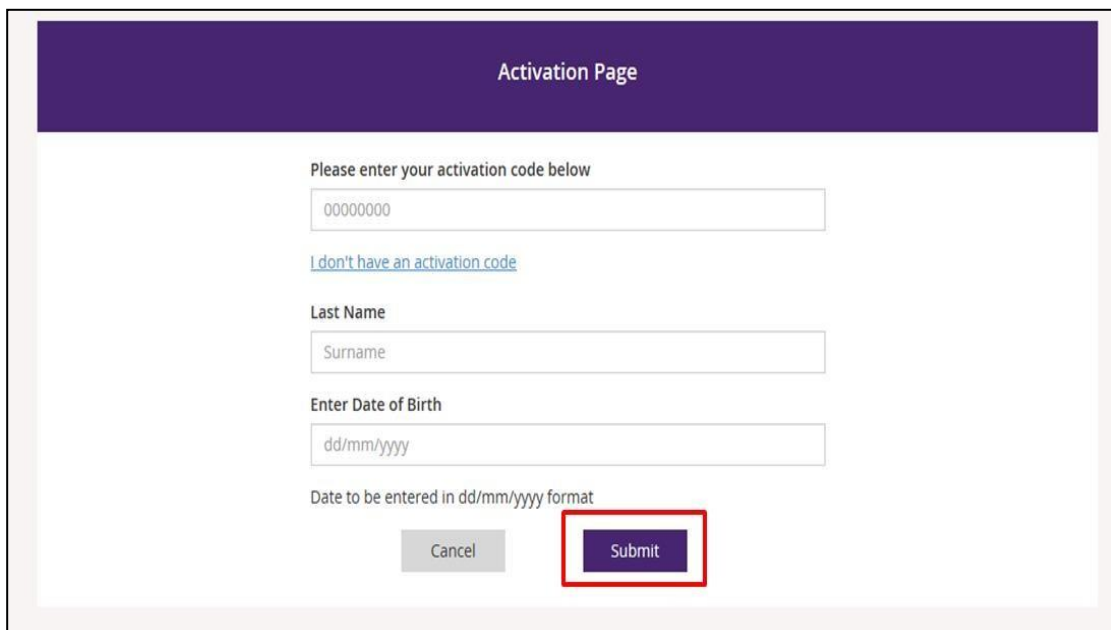
1. Sign into myGov (my.gov.au) using your existing user name and password.
2. To link your myGov account to your NDIA record, click the **View and link services** link at the bottom-right of the page.



3. Then choose **National Disability Insurance Scheme** from the **Link a service** list.

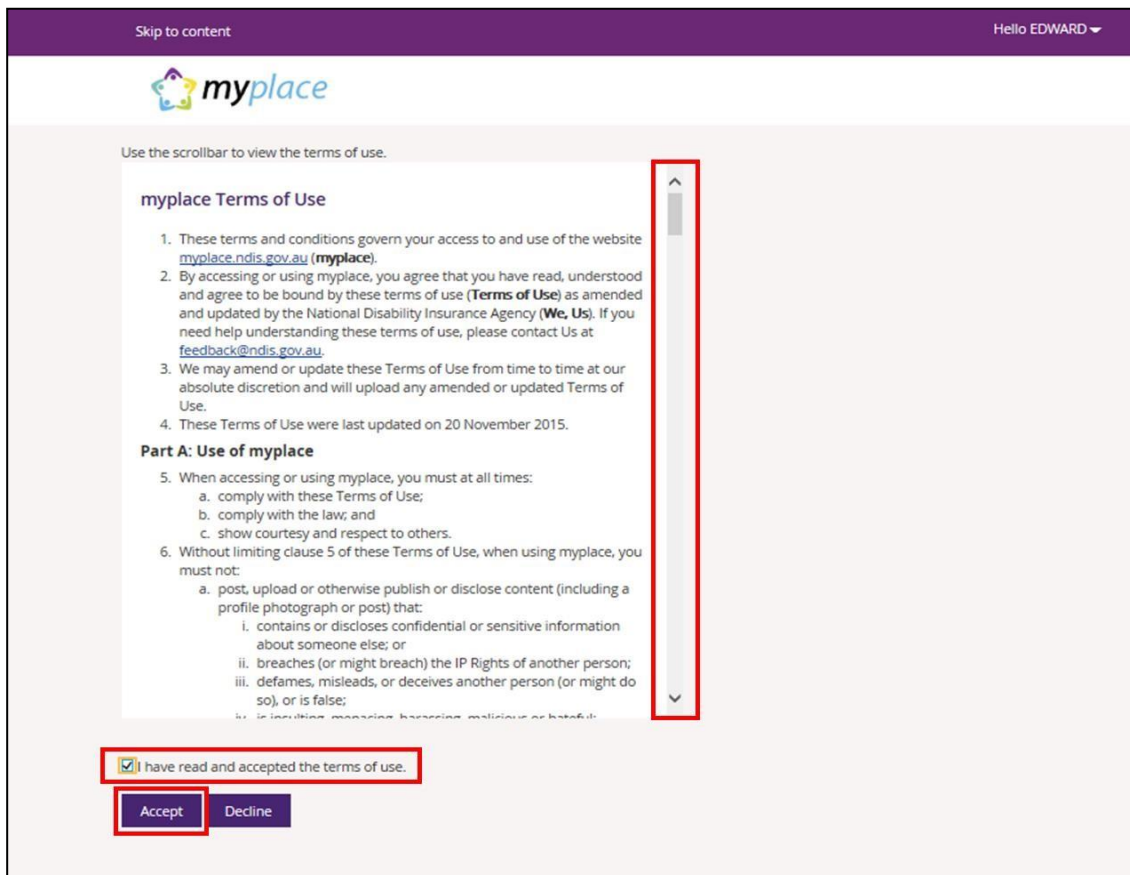


4. Type in your NDIS Activation Code, your Last Name, and your Date of Birth, then click the **Submit** button at the bottom of the screen. You only need to put in the NDIS activation code the first time you access the portal. This screen will not display again.



5. The Terms of Use will be displayed the first time you sign into the portal or when there have been updates that you need to be aware of. Move the scrollbar up and down to view the Terms of Use.

6. Once you have read the Terms of Use, select the checkbox located next to **I have read and accepted the terms of use** and press **Accept** button to continue.



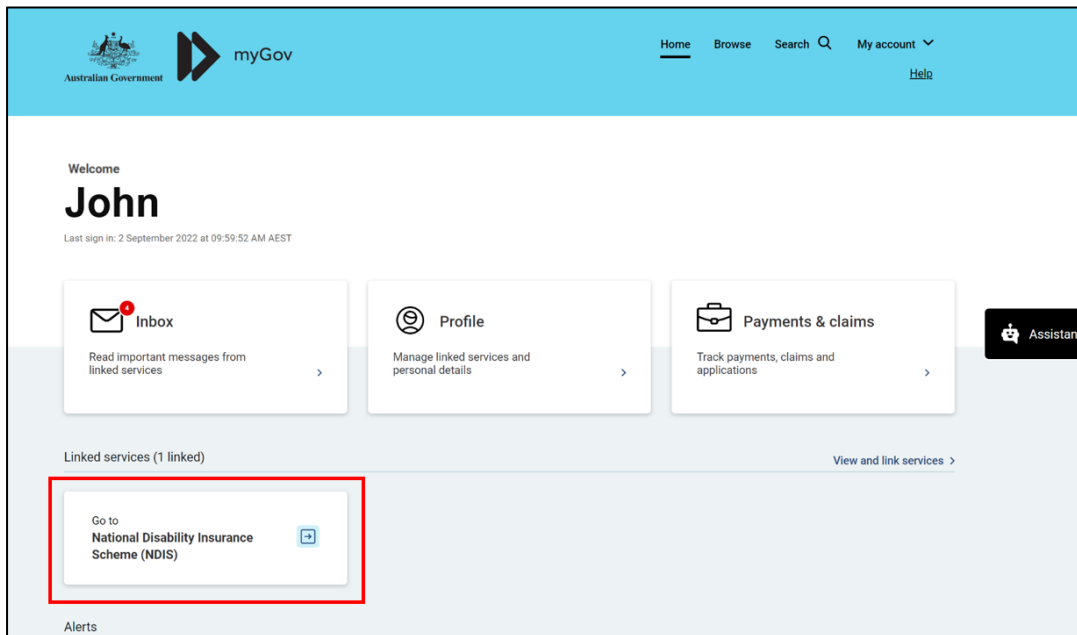
The portal home page displays.

Logging into the portal after linking with myGov

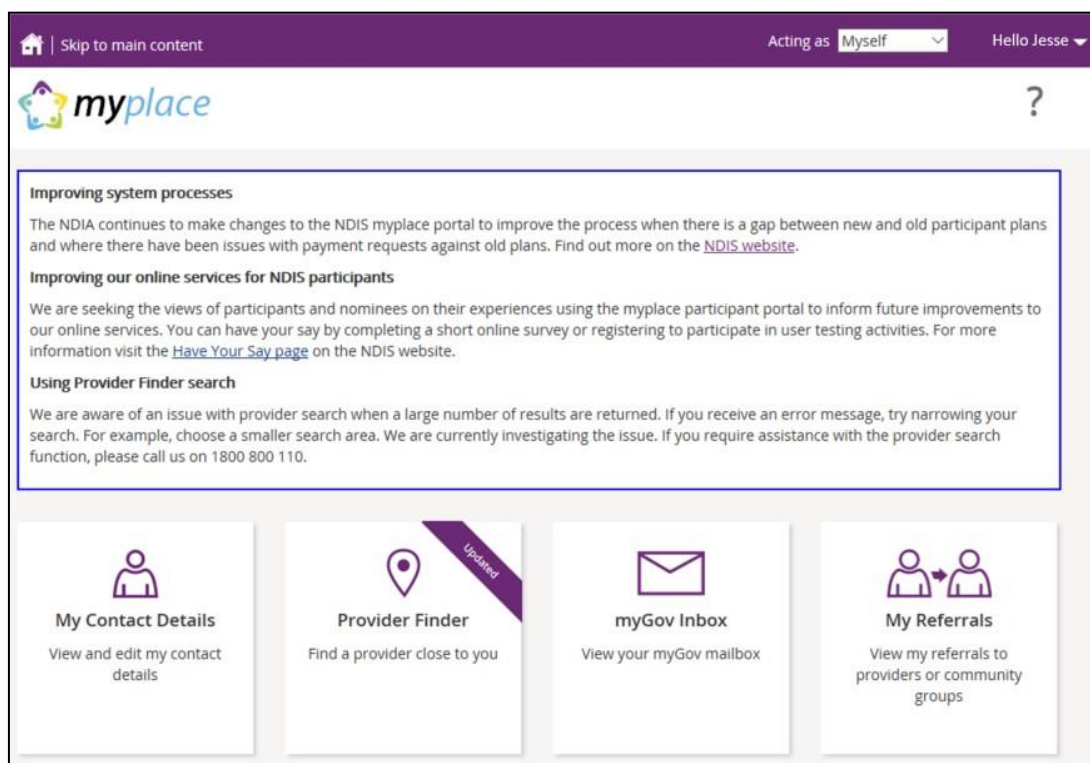
Once you have linked your myGov account with your NDIS account, you can access the portal via the myGov website (my.gov.au) or via NDIS website (ndis.gov.au).

The portal via myGov website

1. Log into myGov (my.gov.au)
2. Select **NDIS** under **Linked services**.



The portal home page displays.

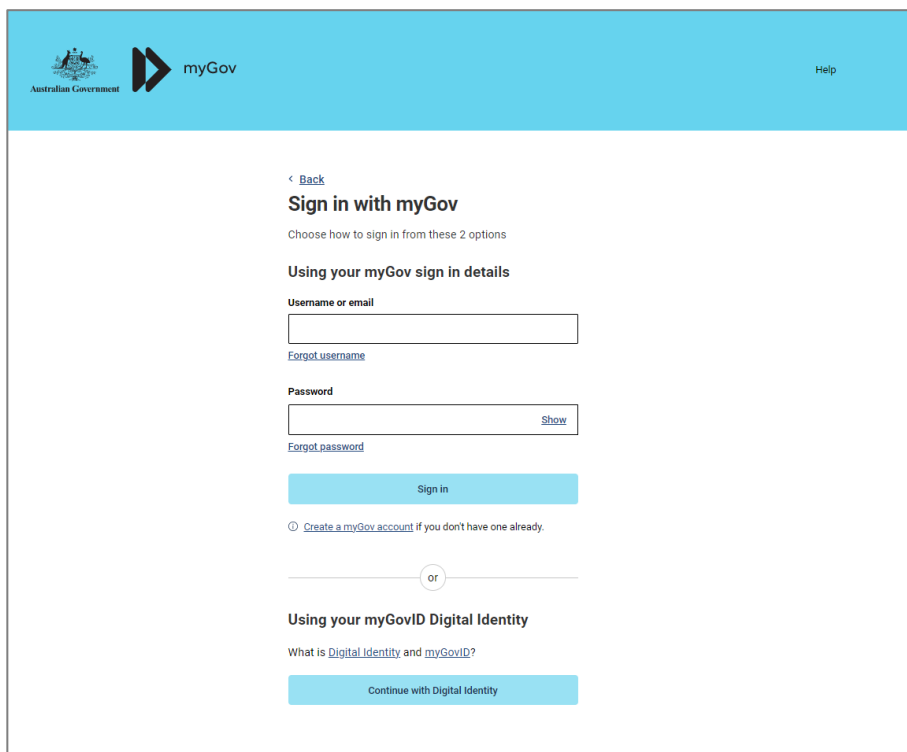


The portal via NDIS website

1. Go to the NDIS website (www.ndis.gov.au).
2. In the top right hand corner click on the **Portal sign in** button and then select **myplace participant portal** from the drop down menu.



3. Enter your myGov username (email or mobile number) and password, and then click the **Sign in** button.

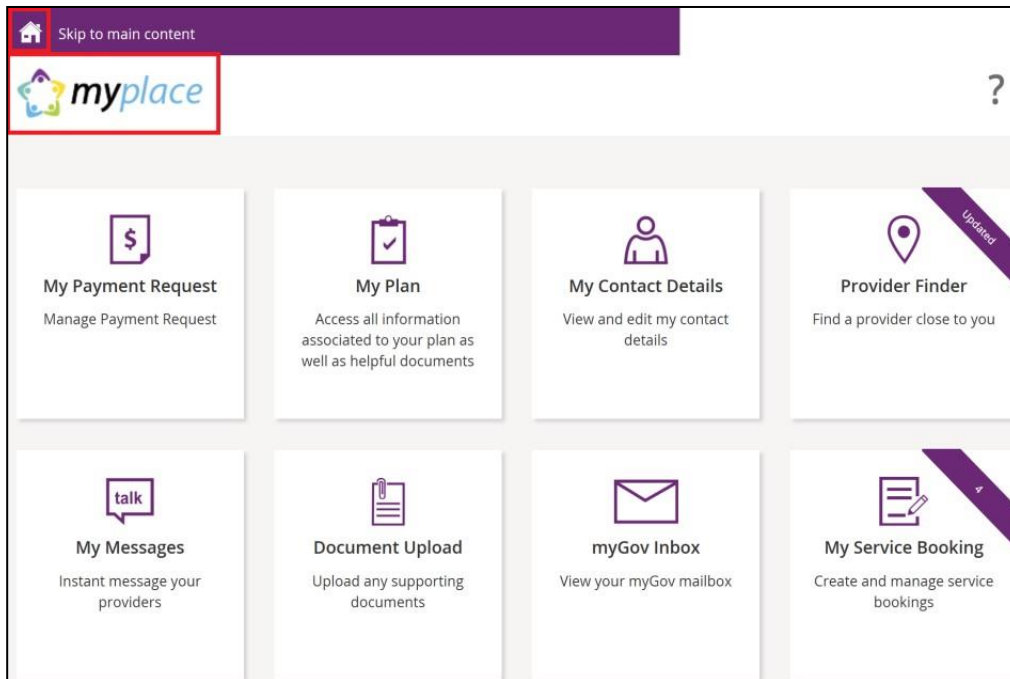


4. Depending on your myGov preferences, you will need to answer secret questions, enter a unique security code or a myGov PIN. Once answered, click the **Next** button. The home page displays.

myplace portal home page


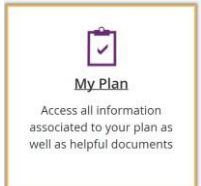
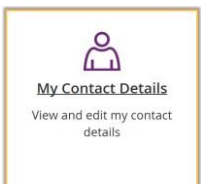

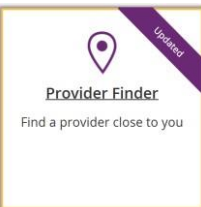

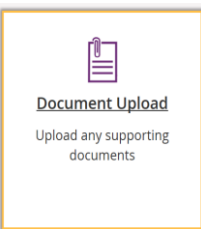
The homepage displays once you have signed in. The tiles you see are specific to the stage of the pathway (your NDIS journey) you have reached, or if you are signing in as a child representative or nominee. For example, the **My Plan** tile is only available once you have an approved NDIS plan.



1. To return to the home page, click on the **myplace** icon or press the **Home** (house) icon.



Tiles

The following table is a brief outline of what function each tile has within the portal.

<i>Tile</i>	<i>Name</i>	<i>Function</i>
	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	Once you have an approved NDIS plan, this is where you can view the details of your plan, including support budget, my referrals and my funding report.
	My Contact Details	View and edit your personal details, contact details, address, How can I contact NDIA , bank account details and consent to share your plan with providers here.
	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	Use the Provider Finder to find a registered NDIS service provider near you. You will also be able to book in a service booking from this screen provided that the provider is taking referrals.
	My Messages	Instant messaging with your providers. (Check with your provider to make sure this function is available for you).
	My Document Upload	Upload documents to support claims or access documentation. Max files size is 25MB, required to have a Document name and description. Below upload document is all available documents previously uploaded.

<i>Tile</i>	<i>Name</i>	<i>Function</i>
 <p>myGov Inbox View your myGov mailbox</p>	myGov Inbox	View your myGov mailbox.
 <p>My Helpful Documents View and save NDIA factsheets and documents</p>	My Helpful Documents	Use My Helpful Documents to access and view useful support booklets available on the NDIS website.

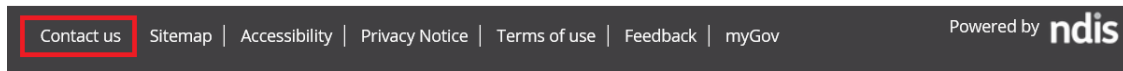
NDIS myplace portal: Step-by-step guide



Select a tile displayed on the home page to go to that function. For example, selecting the **My Payment Request** tile will navigate you to where you can add or view your payment requests.

Need more help?

In the lower left corner of the screen there is an option to contact the NDIA, click the **Contact Us** link for further information and detail on how to contact us. Please direct any queries to the NDIA on **1800 800 110** or visit your local NDIA office.



Logging out of myplace

You can log out by selecting the down arrow next to your name at the top of the screen and Select **Logout**.



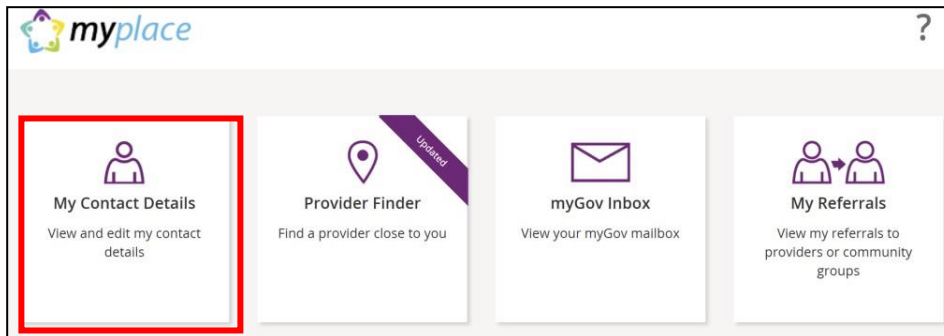
This will return you to the NDIS website if you signed in from there or your myGov home page if you had signed in from there.

My Contact Details

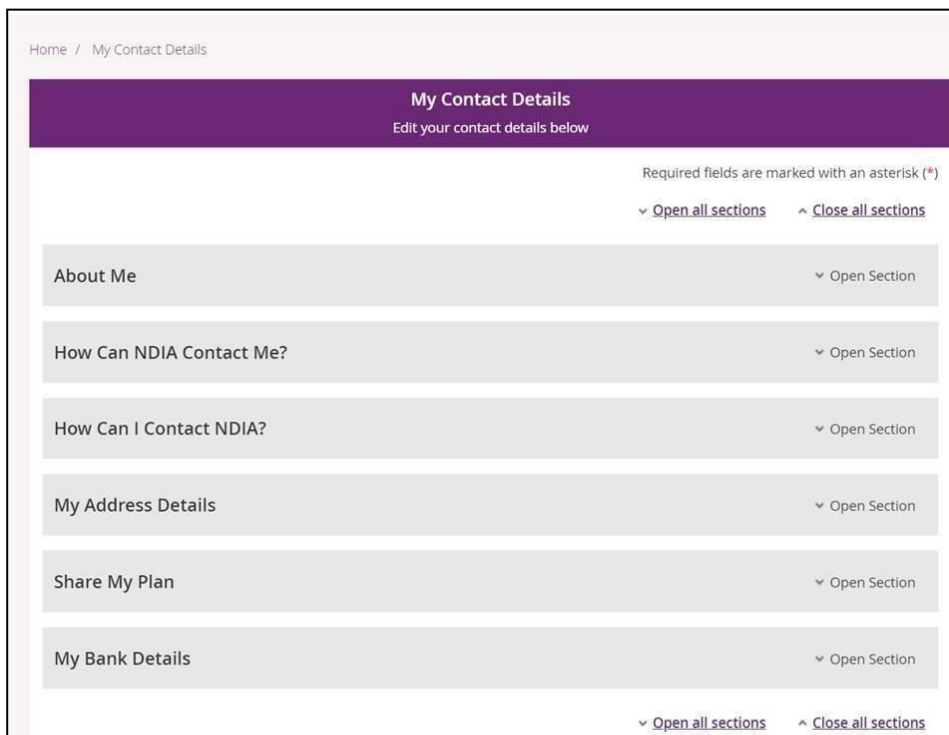
My Contact Details is where you can manage your personal information. You can update your contact details, address and bank details.

This is also where you can choose 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 home page.



2. The **My Contact Details** screen will display.



About Me

You can view your full name, preferred name, date of birth, NDIS number, gender, Indigenous origin and Australian South Sea Islander information (if applicable).

1. Click the **Open Section** link in the top right hand corner to see the details.

About Me		Close Section
Full Name:	Mr. Test User	
Preferred Name:	Tester	
Date of Birth:	01/01/2000	
NDIS Number:	43000000	
Gender:	Male	
Indigenous Origin:	Neither Aboriginal nor Torres Strait Islander	
Australian South Sea Islander:	No	

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

How Can NDIA Contact Me?

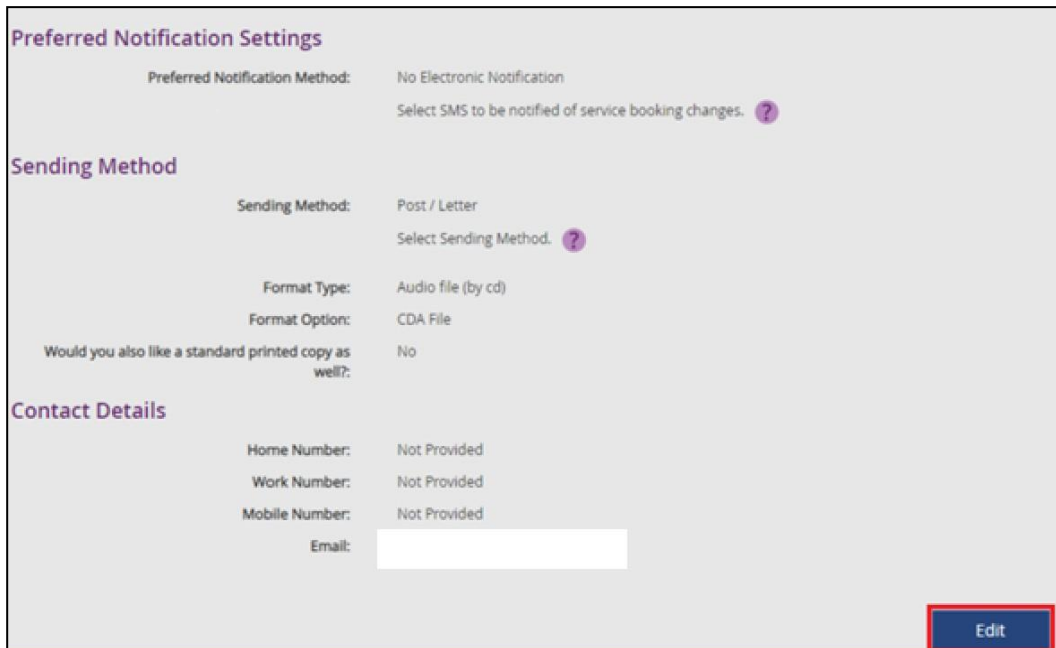
You can update your preferred method for notifications of service bookings, your preferred correspondence method (including different accessible formats) and your contact details in this section.

How Can NDIA Contact Me?	Open Section
--------------------------	--------------

1. Click the **Open Section** link in the top right hand corner to see the details.

How Can NDIA Contact Me?		Close Section
Preferred Notification Settings		
Preferred Notification Method:	No Electronic Notification	
	Select SMS to be notified of service booking changes.	?
Sending Method		
Sending Method:	Post / Letter	
	Select Sending Method.	?
Format Type:	Audio file (by cd)	
Format Option:	CDA File	
Would you also like a standard printed copy as well?:	No	
Contact Details		
Home Number:	Not Provided	
Work Number:	Not Provided	
Mobile Number:	Not Provided	
Email:	[input field]	
		Edit

2. Select the **Edit** button in the bottom right hand corner.



Preferred Notification Settings

Preferred Notification Method: No Electronic Notification
Select SMS to be notified of service booking changes. ?

Sending Method

Sending Method: Post / Letter
Select Sending Method. ?

Format Type: Audio file (by cd)
Format Option: CDA File

Would you also like a standard printed copy as well?: No

Contact Details

Home Number: Not Provided
Work Number: Not Provided
Mobile Number: Not Provided
Email:

Edit

3. Select a **Preferred Notifications Method** if you want to get notified when a provider has updated a service booking.

4. To change the way you receive your letters, select an option from **Sending Method** drop down menu, then choose a **Format Type** and **Format Option**.

Edit Contact Details
 Edit your contact details below

Required fields are marked with an asterisk (*)

Preferred Notification Settings

Preferred Notification Method:*

Select SMS to be notified of service booking changes. ?

Sending Method

Sending Method:*

Select Sending Method. ?

Format Type:*

Format Option:*

Would you also like a standard printed copy as well?:* Yes No ?

Preferred Plan Format

To receive your plan in a different format from other letters:

1. Click the Add Method button below
2. Choose from the options in Sending Method and Format Type
3. Save your changes

You don't need to make any changes if you want to receive your plan in the same way as other letters. You need to delete your current preference before trying to change it.

Letter	Sending Method	Format Type	Format Option	
Plan Summary and Plan Approval	Post / Letter	Braille letter	Braille Grade II Letter	🗑️

[Add Method](#)

Contact Details

i Updating details in this section will update your NDIS account only and will not be shared with MyGov or your other services.

Home Number:

Work Number:

Mobile Number:

Email:

Cancel
Update

Note: If you would like a copy of your plan in a different format to your letters click the **Add Method** button and follow the instructions under **Preferred Plan Format** section.

5. You can update your phone numbers and email address in the **Contact Details** section. Click into the field (or select the delete cross icon) and type in your new details.

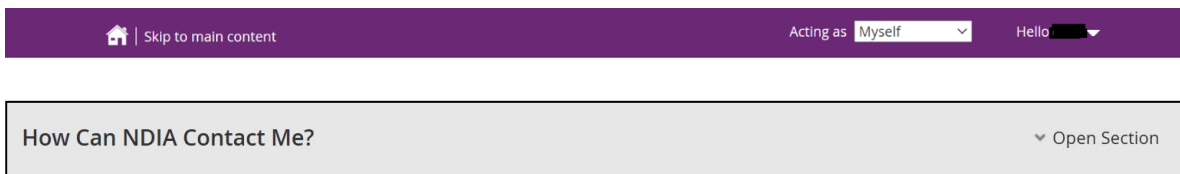
Note: You can update your contact details with myGov and the updated details will be shared with the NDIA automatically. You must have a linked Australian Taxation Office, Centrelink or Medicare account for the updated details to be shared. If you choose to update your contact details in the myplace portal, these updates will not be shared with myGov or your other services.

6. Click the **Update button** to save all changes.

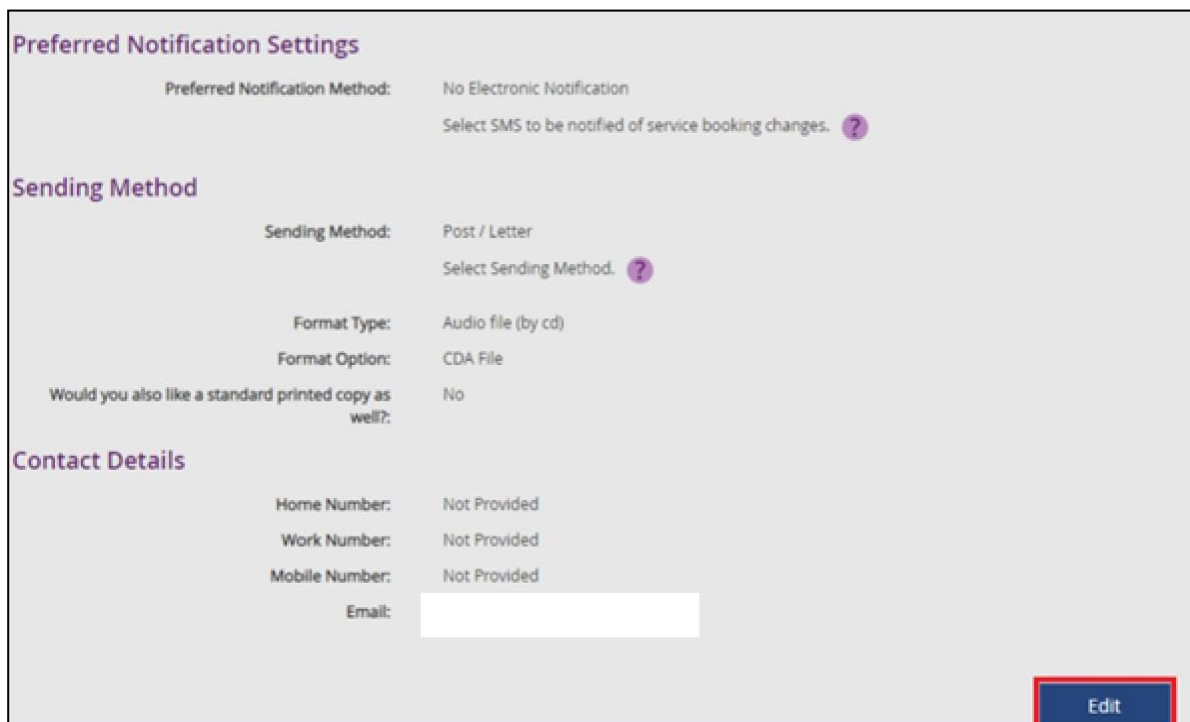
The following message displays to confirm your details have updated.



Please Note: If you are a nominee or a child representative you can update your personal details in the 'How Can NDIA Contact me?'.



1. Select the **Edit** button in the bottom right hand corner



- The **Edit** Contact details displays

Edit Contact Details
Edit your contact details below

Required fields are marked with an asterisk (*)

Preferred Notification Settings

Preferred Notification Method:* SMS

Select SMS to be notified of service booking changes. ?

Sending Method

Sending Method:* Electronic

Select Sending Method. ?

Format Type:* Please Select

Format Option:* Accessible N18 Font Lettr

Would you also like a standard printed copy as well?:* Yes No ?

Contact Details

Home Number: eg. 0300000000

Work Number: eg. 0300000000

Mobile Number: [input field with delete icon]

Email: [input field with delete icon]

Cancel Update

- You can update your phone numbers and email address in the **Contact Details** section. Click into the field (or select the delete cross icon) and type in your new details.

How Can I Contact NDIA?

How Can I Contact NDIA? Close Section


My NDIS Contact:	Jimmy C Local Area Coordinator Welcome Support Services 1800111222 jimmyc@welcomesupport.com
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

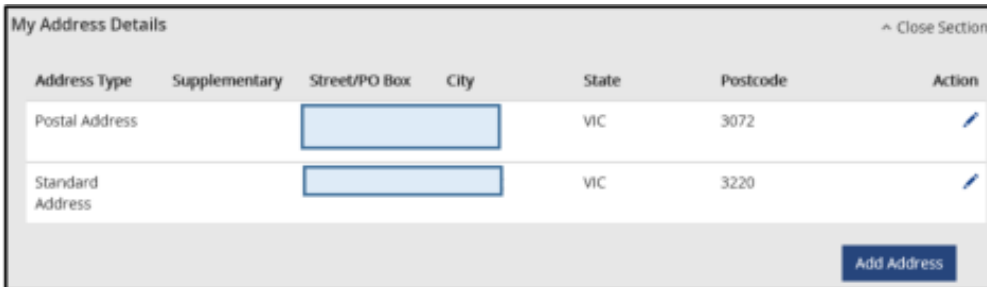
The **How Can I Contact NDIA** section provides the contact detail of your My NDIS Contact and our Contact Centre phone numbers.



My Address Details

You can view and update your postal and home (standard) addresses.

My Address Details ▼ Open Section

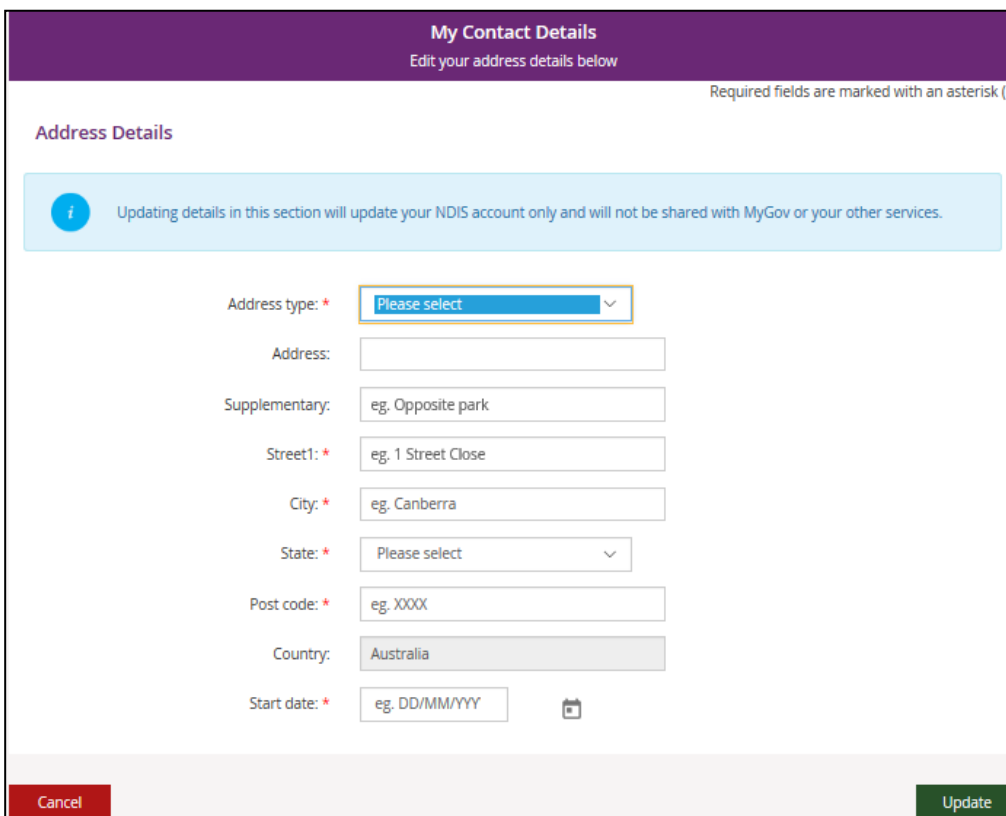
1. Click the **Edit** (pencil)  icon to update an address.



Address Type	Supplementary	Street/PO Box	City	State	Postcode	Action
Postal Address		<input type="text"/>		VIC	3072	
Standard Address		<input type="text"/>		VIC	3220	

[Add Address](#)


2. Select the **Add Address** button to add a new address.



My Contact Details
Edit your address details below

Required fields are marked with an asterisk (*)

Address Details

 Updating details in this section will update your NDIS account only and will not be shared with MyGov or your other services.

Address type: *

Address:

Supplementary:


Street1: *

City: *

State: *

Post code: *

Country:

Start date: * 

[Cancel](#) [Update](#)

3. Select the **Address type** and fill out the address fields. Enter the **Start date** and then select **Update** to save.

Note: You can update your contact details with myGov and the updated details will be shared with the NDIA automatically. You must have a linked Australian Taxation Office, Centrelink or Medicare account for the updated details to be shared. If you choose to update your contact details in the myplace portal, these updates will not be shared with myGov or your other services.

Please Note: If you are a nominee or a child representative you can update your personal details in the 'My Contact Details'.

Skip to main content
 Acting as Myself Hello ██████

My Address Details Open Section

1. Click the **Edit** (pencil) icon to update an address

My Address Details Close Section

Address Type	Supplementary	Street/PO Box	City	State	Postcode	Action
Standard Address			MAROUBRA	NSW	2035	

[Add Address](#)

2. The **My Contact Details** screen displays.

My Contact Details
 Edit your address details below

Required fields are marked with an asterisk (*)

Address Details

Address type: * Standard Address ▼

Address:

Supplementary:

Street1: *

City: * MAROUBRA

State: * NSW ▼

Post code: * 2035

Country: Australia

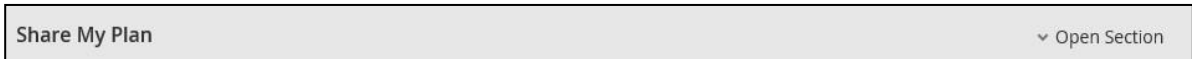
Start date: * 01/04/2020

Cancel
Update

3. Fill out the address fields. Enter the **Start date** and then select **Update** to save.

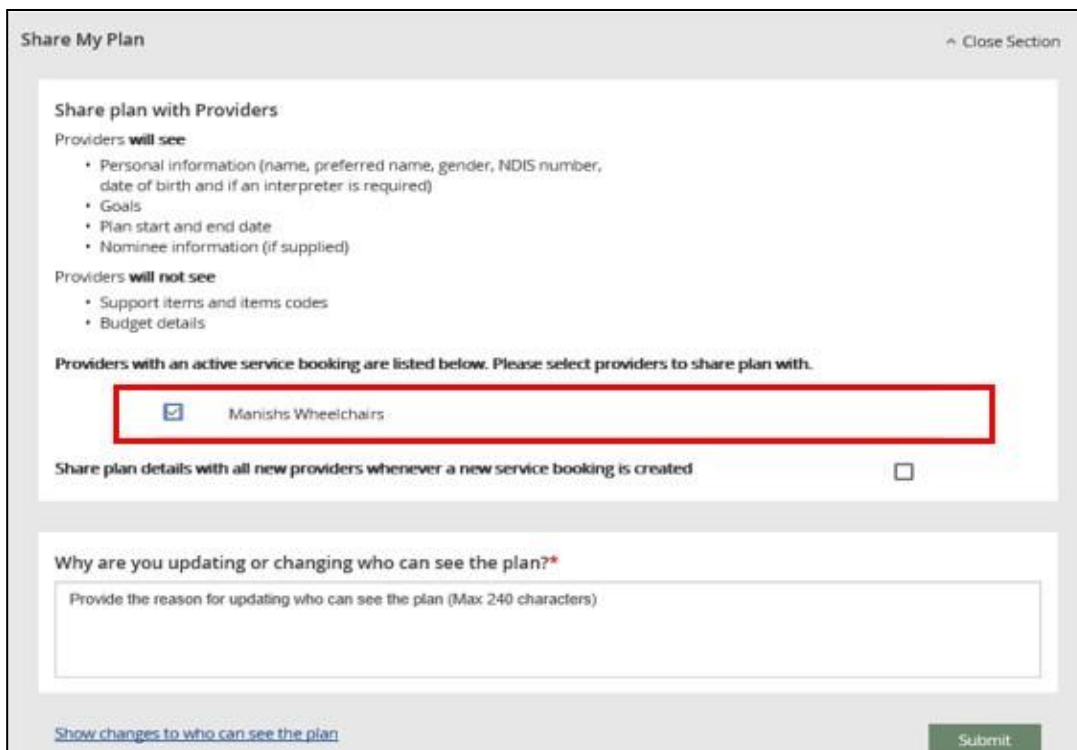
Share My Plan

The **Share My Plan** function enables you to share parts 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 untick to not share.
2. Provide a reason for the change in the **Why are you updating or changing who can see the plan** text box.
3. Click the **Submit** button to finalise the changes.



Share My Plan Close Section

Share plan with Providers

Providers **will see**

- Personal information (name, preferred name, gender, NDIS number, date of birth and if an interpreter is required)
- Goals
- Plan start and end date
- Nominee information (if supplied)

Providers **will not see**

- Support items and items codes
- Budget details

Providers with an active service booking are listed below. Please select providers to share plan with.

<input checked="" type="checkbox"/>	Manish Wheelchairs
-------------------------------------	--------------------

Share plan details with all new providers whenever a new service booking is created

Why are you updating or changing who can see the plan?*

Provide the reason for updating who can see the plan (Max 240 characters)

[Show changes to who can see the plan](#) Submit

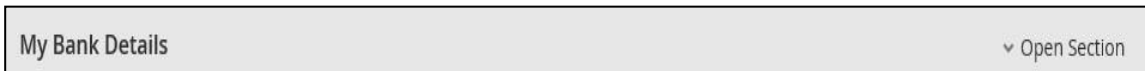
Note: you can change a provider’s permission to view your plan at any time. It is your choice if you share your plan details with providers.

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

My Bank Details

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

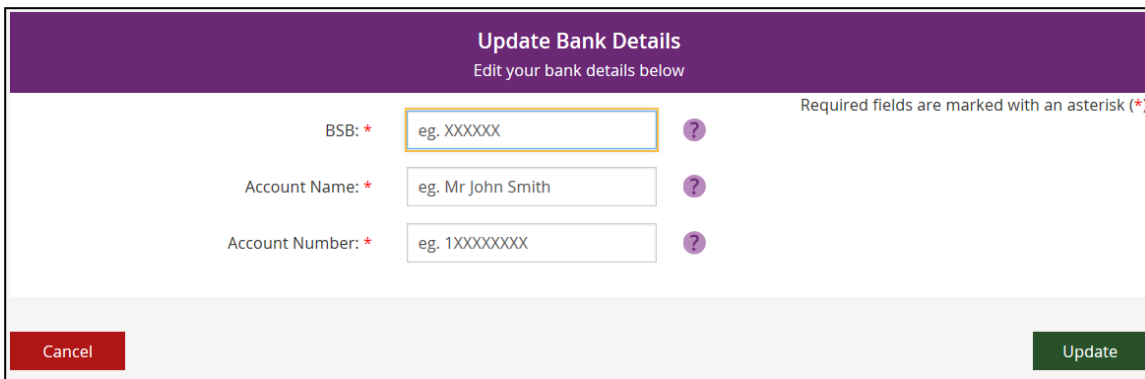
*“We have updated your bank account details as requested. If necessary, contact NDIA on **1800 800 110**”.*



1. Click the **Open Section** link to view your bank details.
2. Click the **Add Bank Details** button to add a new account.



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



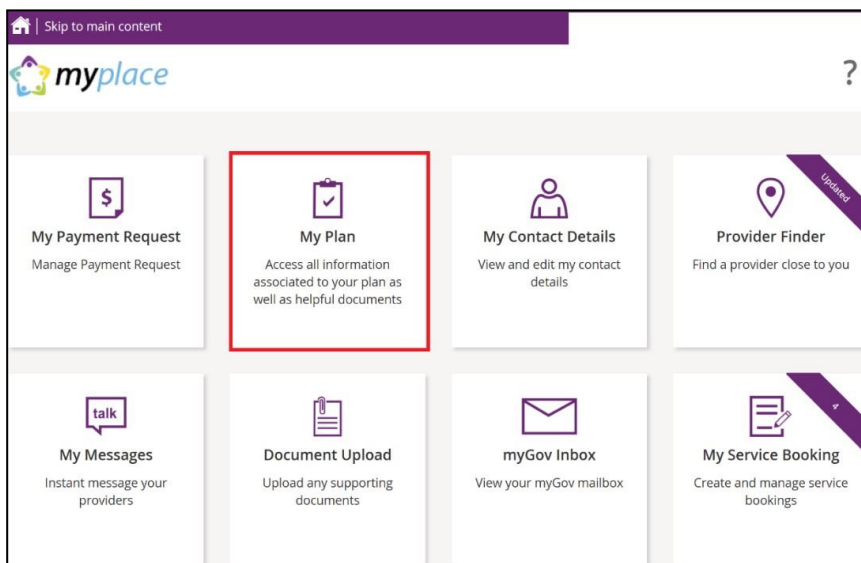
4. Click the **Close Section** link in the top right hand corner to close this section.

Note: If you are a Plan Nominee or Child Representative, contact the NDIA on **1800 800 110** to update the bank account details on your behalf.

My Plan

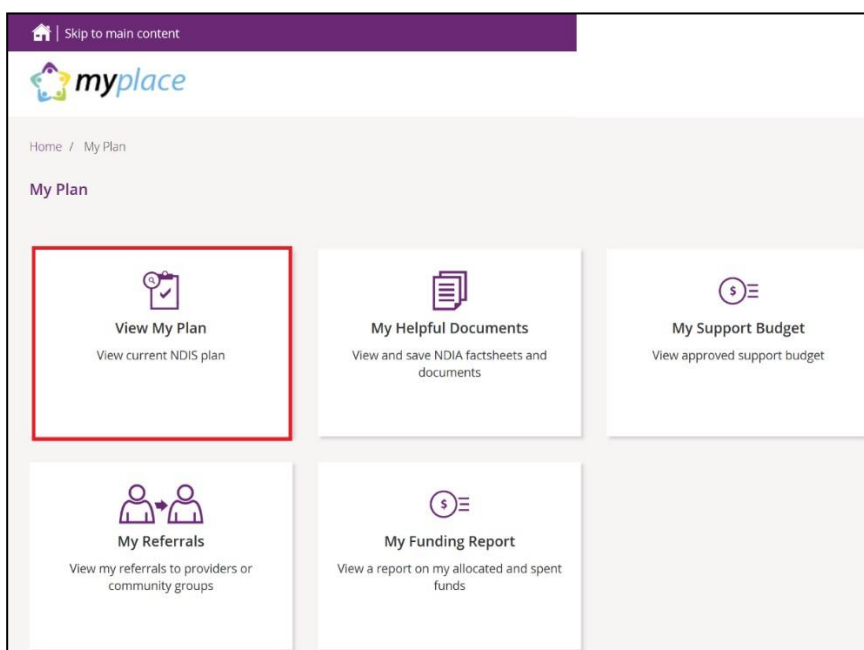
The My Plan tile displays once you have an approved NDIS plan. You can view your current and previous plans, your support budget and any referrals.

1. Select the **My Plan** tile on the homepage.



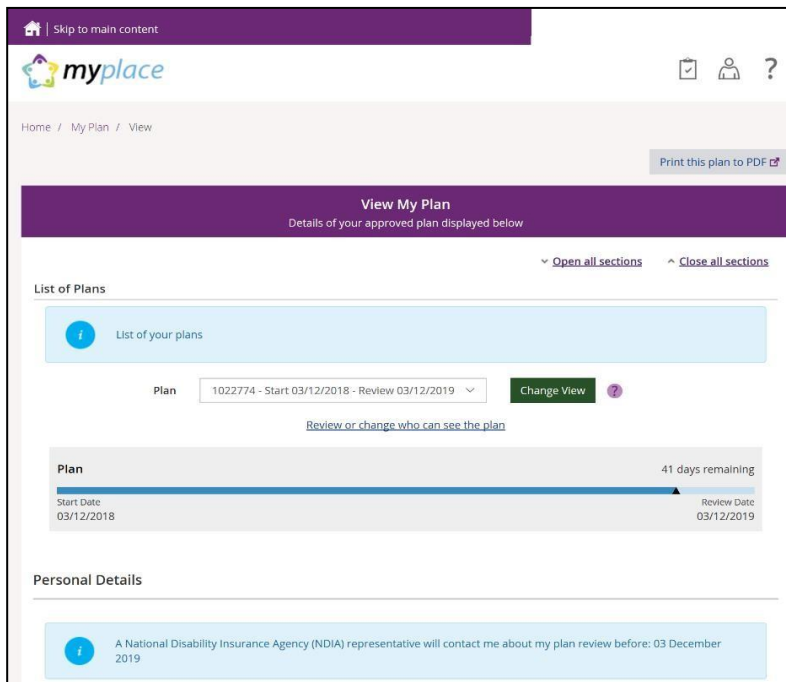
Once the **My Plan** tile opens, you will see the following tiles:

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

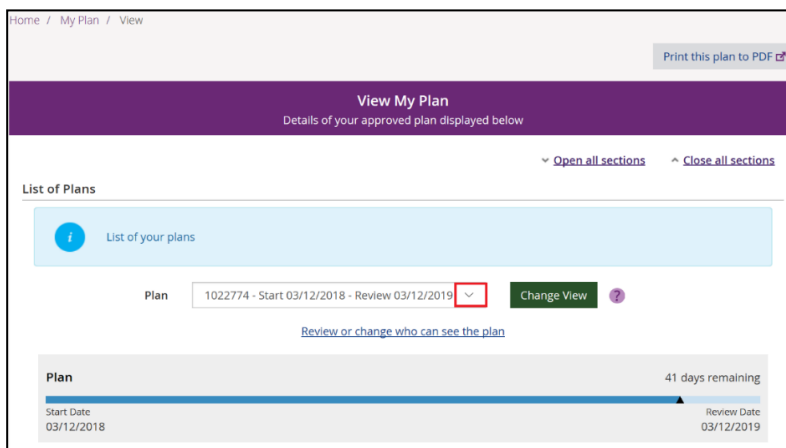


View My Plan

All information about your plan is available in **View My Plan**. You can keep track of your plan review date, days remaining, My NDIS contact, goals, profile, funded supports information and access additional information in the **Find out more** section. You can also view previous plan information. This is a view only section of the portal.



1. Your current plan defaults. If you want to select a previous plan, use the **Dropdown Arrow** in the **List of Plans** section.




Note: To view a past plan, use the **Change View** button.

2. Click the **Open all Sections** link to view all the information under each of the headings.
3. To print a copy of your plan, click on the **Print this plan to PDF** button on the top right hand corner of the screen.

Note: In some instances you may not be able to preview or print a copy of the plan and you will see this message:

'Plan document could not be retrieved. Please [contact us](#) to request a copy of this plan'


Plan document could not be retrieved. Please [contact us](#) to request a copy of this plan.


If you see this message and you cannot view a copy of the plan please [contact the NDIS](#) for help.

View My Plan: Sections of the Plan

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

Contact the NDIA 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: 20 February 2020

NDIS Number	430000000
My NDIS contact	Angela M NDIA Planner National Disability Insurance Agency 4546465464 example2@gmail.com
NDIS plan start date	20 February 2019
NDIS plan review due date	20 February 2020
Plan Length (months)	12

The **Profile** section outlines key information about you, such as your date of birth, current contact details, information about yourself (About me) and who supports you.

EMILY's Profile Close Section

What I want people to know about me

Date of birth	01 January 1990
Current contact details	999 TEST ST TESTVILLE VIC 3999 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

The **Participant Goals** outlines the goals you want to achieve and how you will achieve them and how you will be supported.

Emily's Goals Close Section

This is what I want to achieve

Short-term goal

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

How I will achieve this goal	How I will be supported
Information about what will assist you to achieve your goal. Can include steps or a plan to work towards your goal.	Any identified supports which will assist you to achieve your goal.

Medium or long-term goal

Learn job searching skills.

How I will achieve this goal	How I will be supported
Information about what will assist you to achieve your goal. Can include steps or a plan to work towards your goal.	Any identified supports which will assist you to achieve your goal.

The **Funded Supports** section outlines the supports funded by the NDIS to help you achieve your goals. There is information on what the funding can be used for, how it is managed (e.g. self-managed) as well as how this funding amount is divided across the support categories (or budgets) in your plan.

Funded Supports Information Close Section

For agency and plan managed funded supports, you can use your Core Support budget across these four categories - Consumables, Assistance with Social and Community Participation, Assistance with Daily Life and/or Transport. Please note: You may see \$0 funding in the transport category. This is a known error and you can still use your Core funds for transport.

My funded supports can help me achieve my goals

Managing my NDIS funding - Help

Total Funded Supports	\$44,236.97
------------------------------	--------------------

For 03 January 2020 - 02 January 2021

Core Supports

Core supports help with my everyday activities, my current disability related needs and to work towards my goals. The Core Supports budget is the most flexible, and in most cases, funding can be used across the support categories (however, this may not include transport).

Goal/s my Core Supports funding can help me achieve:

- Simple
- Complex

Core Supports	Budget
Incontinence Alarms (x 10) STA And Assistance (Inc. Respite) - 1:4 - Weekday (x 5) My Core Supports funding will be: <ul style="list-style-type: none"> • \$30,000.00 Self-managed My Stated Supports funding will be: <ul style="list-style-type: none"> • \$1,000.00 Self-managed Incontinence Alarms • \$2,731.80 Self-managed STA And Assistance (Inc. Respite) - 1:4 - Weekday 	\$33,731.80
Transport My Transport funding will be: <ul style="list-style-type: none"> • Paid as fortnightly instalments into my nominated bank account 	\$1,000.00
Total Core Supports	\$34,731.80

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.

Goal/s my Capacity Building Supports funding can help me achieve:

- Simple
- Complex

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

Capacity Building Supports	Budget
Support Coordination Level 1: Support Connection (x 10) My Support Coordination funding will be: <ul style="list-style-type: none"> • \$2,000.00 Self-managed My Stated Supports funding will be: <ul style="list-style-type: none"> • \$601.60 Self-managed Level 1: Support Connection 	\$2,601.60
Total Capacity Building Supports	\$2,601.60

Capital Supports

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

Goal/s my Capital Supports funding can help me achieve:

- Simple
- Complex

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

Capital Supports	Budget
Assistive Technology Adapted Landline Telephone (x 3) My Assistive Technology funding will be: <ul style="list-style-type: none"> • \$1,000.00 Self-managed My Stated Supports funding will be: <ul style="list-style-type: none"> • \$903.57 Self-managed Adapted Landline Telephone 	\$1,903.57
Home Modifications My Home Modifications funding will be: <ul style="list-style-type: none"> • \$5,000.00 Self-managed 	\$5,000.00
Total Capital Supports	\$6,903.57

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.

The **Find out more** section has information about who to contact if you need help with your plan, the [Booklet 3 – Using your NDIS Plan](#) that is on the NDIS website and other ways to contact the NDIA.

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

1. Click the **My Plan** link at the top of the page to navigate back.

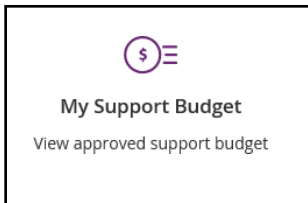
Home / My Plan / View

My Support Budget

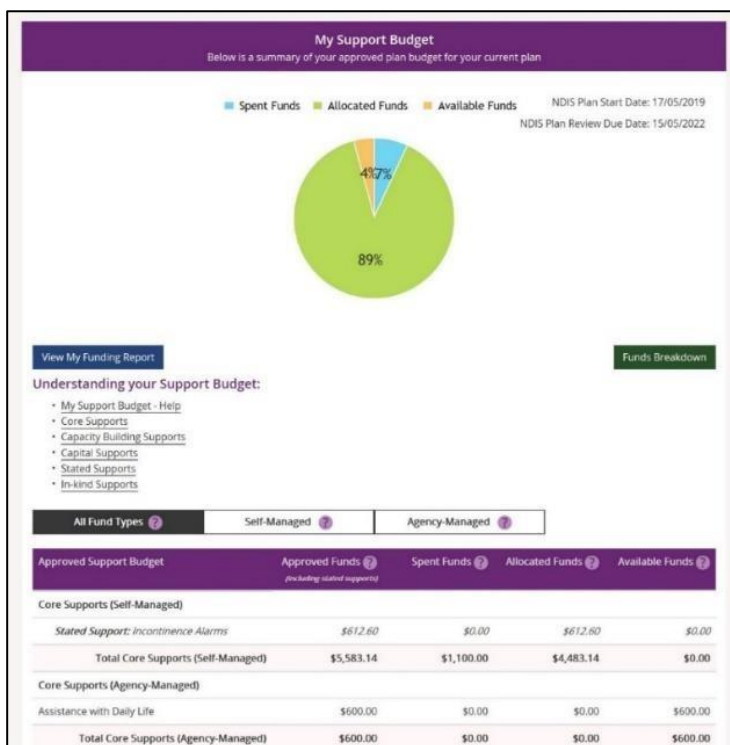
My Support Budget is a summary of your current plan support budget. You can compare your approved funds, allocated, spent and remaining budget. The budget is also broken down by how the funding is managed (i.e. Agency, Plan or Self).

Note: Move your cursor over the question icons on the screen for further information about terms or features.

1. Click on the **My Support Budget** tile on the **My Plan** page.



The **My Support Budget** screen displays.



Your plan start and scheduled review dates are shown at the top of the screen. A pie chart displays in percentages your Spent Funds, Allocated Funds and Available Funds. Moving your mouse cursor over the pie chart shows the dollar values.

The **Understanding your Support Budget** section has links to information explaining:

- My support budget –Help
- Core supports
- Capacity building supports
- Capital supports
- Stated supports
- In-kind supports

1. Scroll down the page to view the funds table. It shows Approved Funds, Spent Funds, Allocated Funds and Available Funds for each support type and support category.

All Fund Types ?	Self-Managed ?	Agency-Managed ?		
Approved Support Budget	Approved Funds ? <i>(including stated supports)</i>	Spent Funds ?	Allocated Funds ?	Available Funds ?
Core Supports (Self-Managed)				
<i>Stated Support: Incontinence Alarms</i>	\$612.60	\$0.00	\$612.60	\$0.00
Total Core Supports (Self-Managed)	\$5,583.14	\$1,100.00	\$4,483.14	\$0.00
Core Supports (Agency-Managed)				
Assistance with Daily Life	\$600.00	\$0.00	\$0.00	\$600.00
Total Core Supports (Agency-Managed)	\$600.00	\$0.00	\$0.00	\$600.00
Core Supports - Transport (Periodic)				
Transport (Periodic)	\$1,000.00	\$85.54	\$0.00	\$914.46
Total Core Supports - Transport (Periodic)	\$1,000.00	\$85.54	\$0.00	\$914.46
Capacity Building Supports (Self-Managed)				
Support Coordination	\$2,038.80	\$0.00	\$2,038.80	\$0.00
Total Capacity Building Supports (Self-Managed)	\$2,038.80	\$0.00	\$2,038.80	\$0.00
Capital Supports (Self-Managed)				
Assistive Technology	\$6,829.80	\$1,310.00	\$5,519.80	\$0.00
<i>Stated Support: Text To Speech Device</i>	<i>\$5,000.00</i>	<i>\$1,310.00</i>	<i>\$3,690.00</i>	<i>\$0.00</i>
Home Modifications	\$20,092.52	\$0.00	\$20,092.52	\$0.00
<i>Stated Support: Elevator - Home</i>	<i>\$1,278.00</i>	<i>\$0.00</i>	<i>\$1,278.00</i>	<i>\$0.00</i>
<i>Stated Support: Lifts/Stair Climbers/Elevator</i>	<i>\$14,292.00</i>	<i>\$0.00</i>	<i>\$14,292.00</i>	<i>\$0.00</i>
Total Capital Supports (Self-Managed)	\$26,922.32	\$1,310.00	\$25,612.32	\$0.00
Total Support Budget	\$36,144.26	\$2,495.54	\$32,134.26	\$1,514.46

Note: The value for the stated item is included in your approved funds where applicable.

Back

2. You can view the budget by your funds management breakdown by selecting from the tabs available (for example, Self-Managed). The **All Funds Type** is the total values of the support budget.

View My Funding Report

The funding report provides a summary of allocated and spent funding in your plan organised by self-managed supports, agency managed supports and plan managed supports (if applicable). The funding report includes information on service booking dates and last payment request information.

Home / My Plan / My Funding Report

My Funding Report

Below is a summary of your allocated and spent funding in your plan

View My Support Budget

Understanding your Funding Report:

- [My Funding Report - Help](#)
- [Core Supports](#)
- [Capacity Building Supports](#)
- [Capital Supports](#)
- [Stated Supports](#)
- [In-kind Supports](#)

Core Supports

Support Category	Start Date ?	End Date ?	Allocated Funds ?	Spent Funds ?	Last Payment Date ?
Transport (Periodic)	n/a	n/a	\$914.46	\$85.54	19/08/2019

Self-Managed Supports

Core Supports

Support Category	Start Date ?	End Date ?	Allocated Funds ?	Spent Funds ?	Last Payment Date ?
Consumables	17/05/2019	15/05/2022	\$1,416.54	\$0.00	
<i>Stated Support: Incontinence Alarms</i>	17/05/2019	15/05/2022	\$612.60	\$0.00	
Assistance with Social and Community Participation	17/05/2019	15/05/2022	\$991.00	\$1,100.00	21/05/2019
Assistance with Daily Life	17/05/2019	15/05/2022	\$1,463.00	\$0.00	

Capacity Building Supports

Support Category	Start Date ?	End Date ?	Allocated Funds ?	Spent Funds ?	Last Payment Date ?
Support Coordination	17/05/2019	15/05/2022	\$2,038.80	\$0.00	

Capital Supports

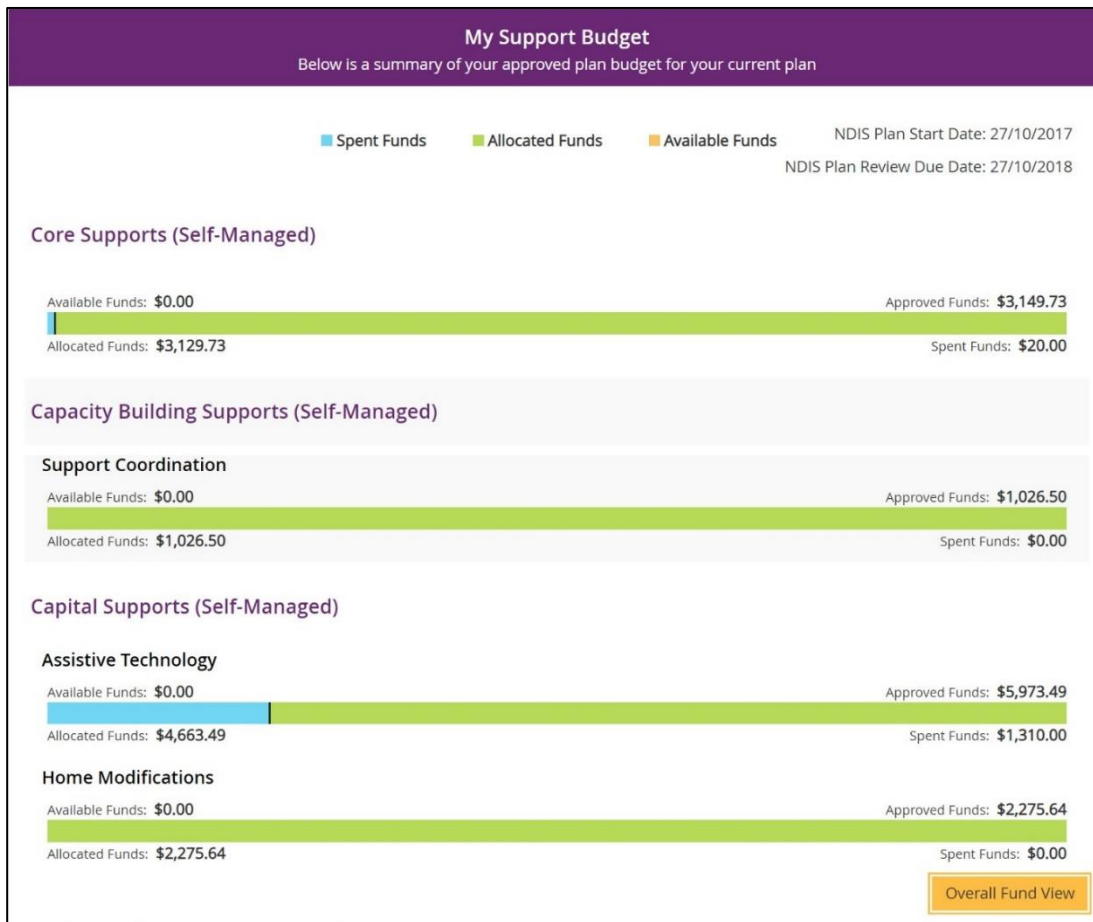
Support Category	Start Date ?	End Date ?	Allocated Funds ?	Spent Funds ?	Last Payment Date ?
Assistive Technology	17/05/2019	15/05/2022	\$1,829.80	\$0.00	
<i>Stated Support: Text To Speech Device</i>	17/05/2019	15/05/2022	\$3,690.00	\$1,310.00	21/05/2019
Home Modifications	17/05/2019	15/05/2022	\$4,522.52	\$0.00	
<i>Stated Support: Elevator - Home</i>	17/05/2019	15/05/2022	\$1,278.00	\$0.00	
<i>Stated Support: Lifts/Stair Climbers/Elevator</i>	17/05/2019	15/05/2022	\$14,292.00	\$0.00	

Back

You can also access **My Funding Report** by selecting the **My Funding Report** from the **My Plan** home screen.

You can select the **View My Support Budget** button at the top of the screen to return to the **My Support Budget** screen or **Back** to return to the My Plan page.

Funds Breakdown



1. Click the **Funds Breakdown** button to the right of the pie chart to view the funds information as a set of bar graphs.

The screen changes to display a detailed view of:

- What funds have been approved in your plan for each support category and support type
- What has been spent, what has been committed and what remains for each support type and support category
- Whether your support for each support category is agency managed, plan managed or self-managed.

Note: The figures shown do not include Payment Requests that have been submitted but not processed.

My Referrals

Your planner can add referrals to your plan and these can be viewed through **My Referrals**.



1. Click the **My Referrals** tile on the **My Plan** page and your current referrals will display.

My Referrals
Below is a list of your referrals

Search for a Referral

Search by: *

Search Results (10 records found)

Provider Name (NDIS Number)	Referral Type	Reason	Area of Referral	Created at
Manishs Wheelchairs (4050000000)	Provider	Plan-Review	Other	06/09/2017
Manishs Wheelchairs (4050000000)	Provider	Plan-Implementation		05/09/2017
Manishs Wheelchairs (4050000000)	Provider	ILC Supports	Transport Services	05/09/2017
Daniels Wheelchairs (4150000000)	Provider	Plan-Implementation	Specialist Assessmt-	28/10/2016
Daniels Wheelchairs (4150000000)	Provider	Plan-Review	ILC/LAC Service	28/10/2016
Daniels Wheelchairs (4150000000)	Provider	ILC Supports	Employment	28/10/2016
Manishs Wheelchairs (4050000000)	Provider	Plan-Implementation	Transport Services	31/08/2016
Manishs Wheelchairs (4050000000)	Provider	Pre-Planning	Employment	31/08/2016
Daniels Wheelchairs (4150000000)	Provider	Plan-Review	Specialist Assessmt-	31/08/2016
Daniels Wheelchairs (4150000000)	Provider	Plan-Implementation	Transport Services	31/08/2016

You can refine your list of referrals by using the **search by** field to select either registered providers or community groups.

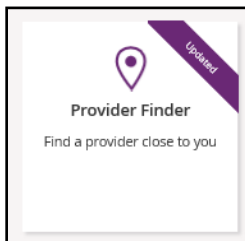
2. Select **Back** to return to the portal home page.

Provider Finder

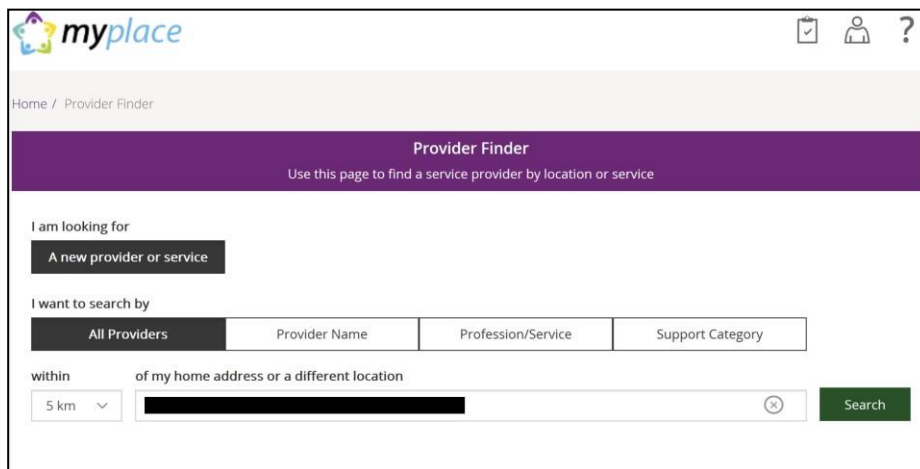
The **Provider Finder** enables you to find and contact a registered provider. You can also view providers you have a service booking with. This section contains contact information of providers via the **View Details** link, and detailed directions via the **Find Directions** link.

Provider Search

1. Select **Provider Finder** tile on the homepage.



The Provider Finder page displays.

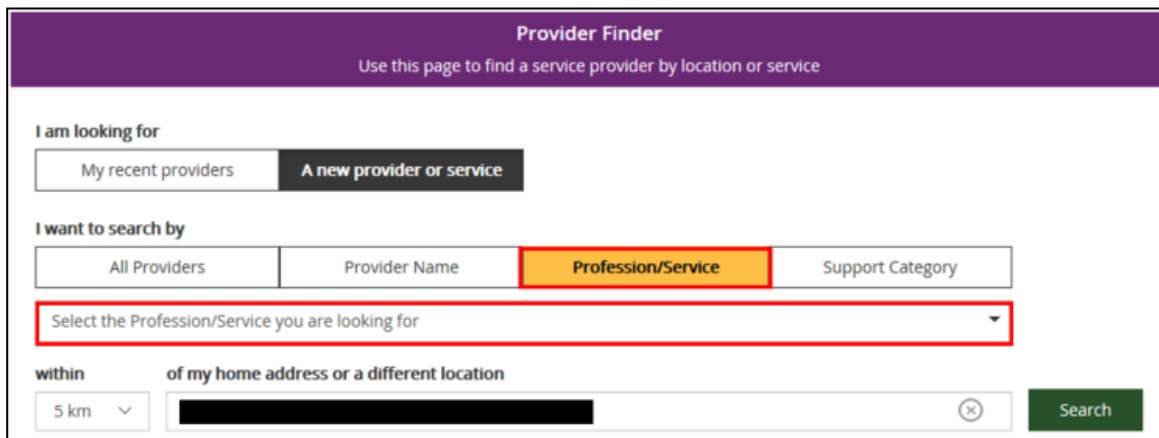


You have the option to search by:

- **All providers:** All providers within the selected distance to your address will display.
- **Provider name:** You can enter the name of the provider you are looking for.
- **Profession/service:** You can choose the profession/service (for example, dietician) from a drop down menu.
- **Support Category:** You can choose the support category you are looking for from a drop down menu.

The following steps is an example of searching by a profession/service.

2. Select the **Profession/Service** tab.



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

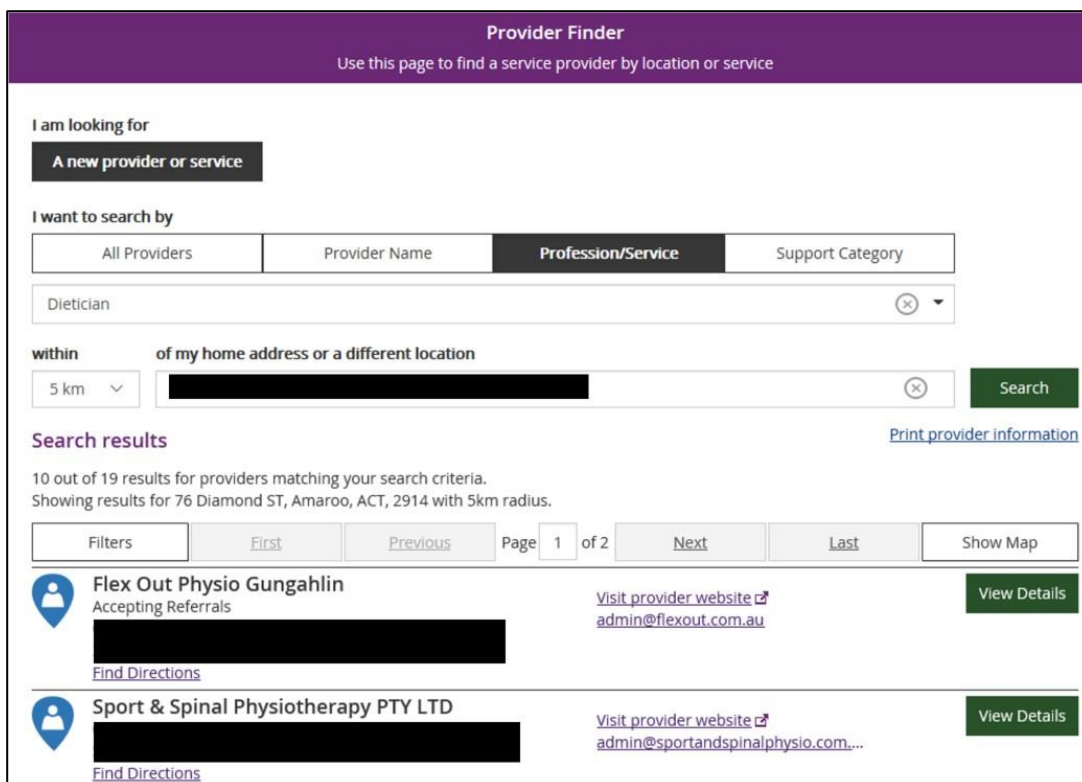
I am looking for

I want to search by

Select the Profession/Service you are looking for

within

3. Click the dropdown box and select a service.
4. The search radius defaults to 5 kilometres from your home address. You can expand the search distance by clicking the **within** dropdown arrow.
5. You can change the address that the search is on by clicking the delete icon in the **'of my home address or a different location'** field and type in an address.
6. Select **Search**. The search results display.



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

I am looking for

I want to search by



Dietician

within

Search results [Print provider information](#)

10 out of 19 results for providers matching your search criteria.
Showing results for 76 Diamond ST, Amaroo, ACT, 2914 with 5km radius.

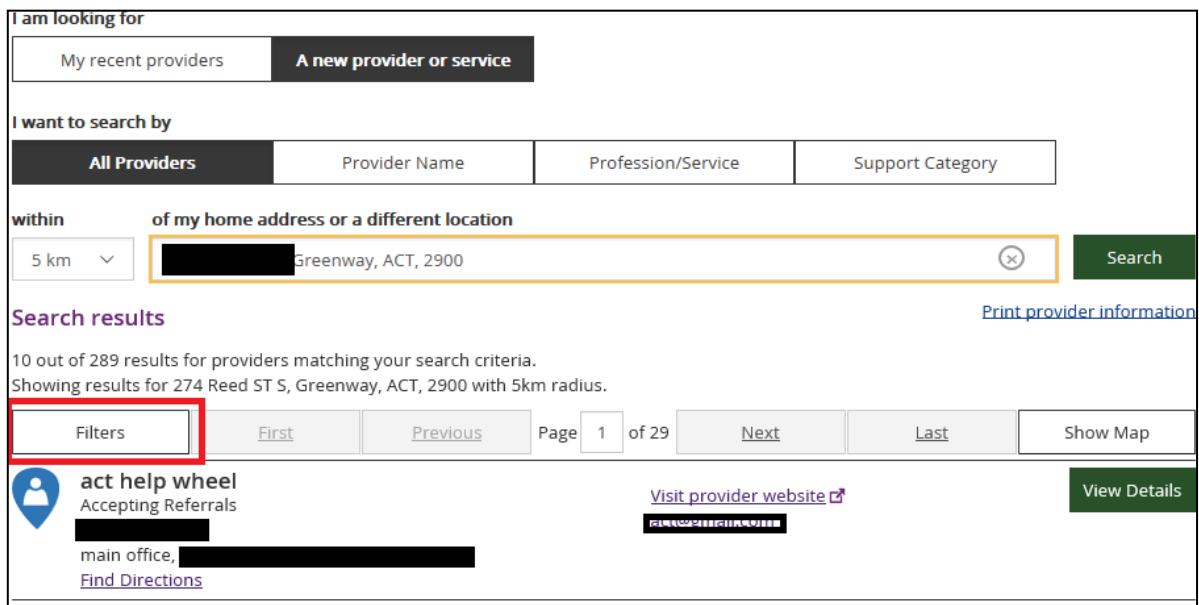
Page 1 of 2

	Flex Out Physio Gungahlin Accepting Referrals <input type="text" value=""/>	Visit provider website admin@flexout.com.au	<input type="button" value="View Details"/>
Find Directions			
	Sport & Spinal Physiotherapy PTY LTD <input type="text" value=""/>	Visit provider website admin@sportandspinalphysio.com...	<input type="button" value="View Details"/>
Find Directions			

- To print your search results, select the **Print provider Information** link.

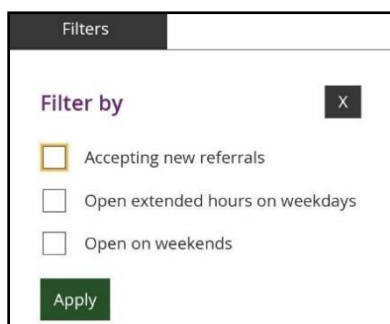


- If there is more than one page of results use the buttons of **Next** and **Last** to look at all the providers.
- To narrow down your search results, you can apply filters to your search by selecting the **Filters** button at the top of the window.



- The following filters can be applied to your search:

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

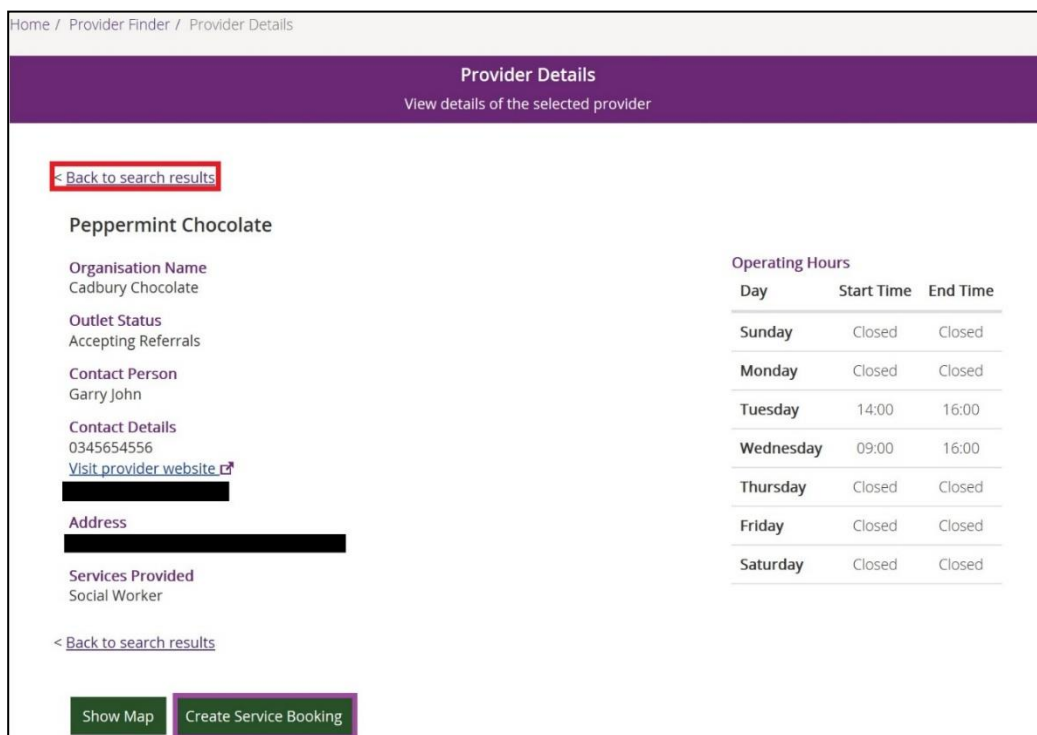


11. To see more information on a specific provider, select the **View Details** button.



12. 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.



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

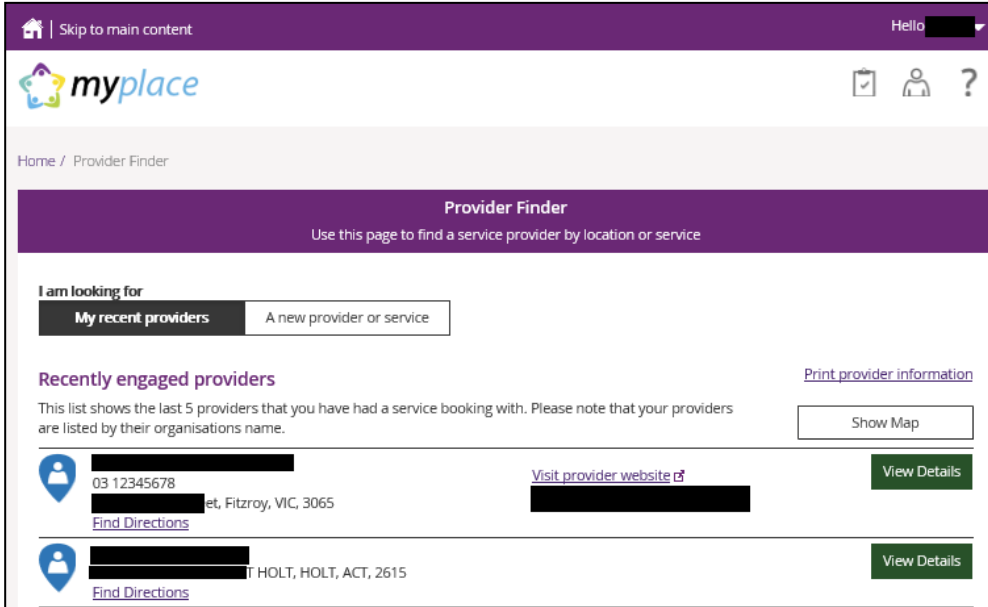
13. Select **Show Map** if you want to see the location of the provider.

14. Once you have found the right provider, select **Create Service Booking** to make a booking with this provider. This button **only** displays if you have support funding that is Agency managed.

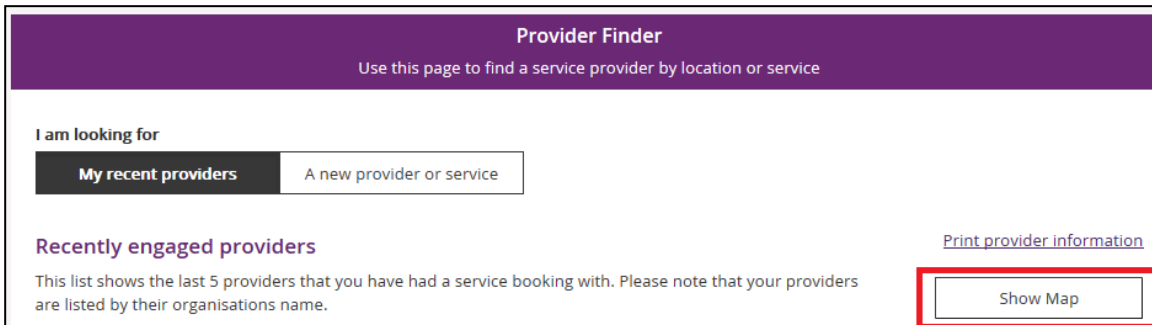
Recent Providers

The **My recent providers** section only displays if you have had service bookings. It displays the providers of your last five service bookings.

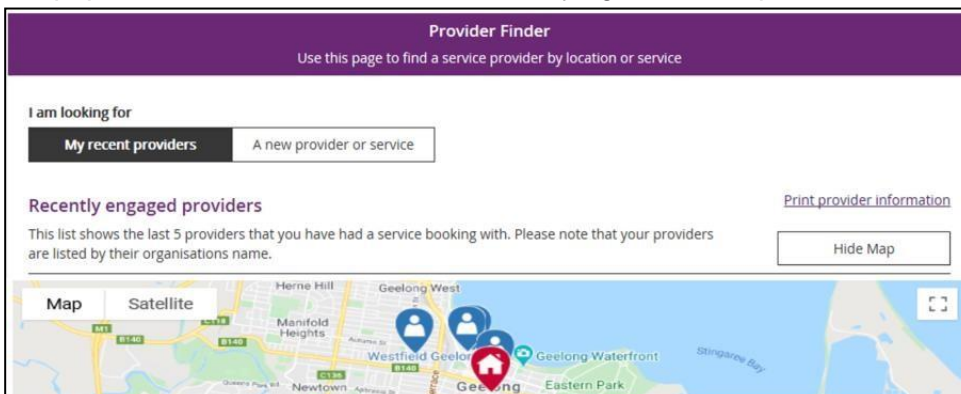
1. Select **My recent providers**. This list the last five providers that you have had a service booking with.



2. To view the location of these providers, select the **Show Map** near the top right hand corner of the window.



A map will populate on screen with markers identifying where the providers are located.



3. Select **Hide Map** to return to the listing of providers.
4. To view contact details and services provided by specific providers, click the **View Details** button to the right of the provider.

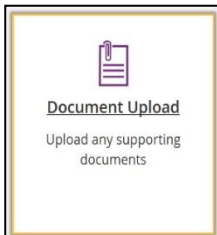


Document Upload

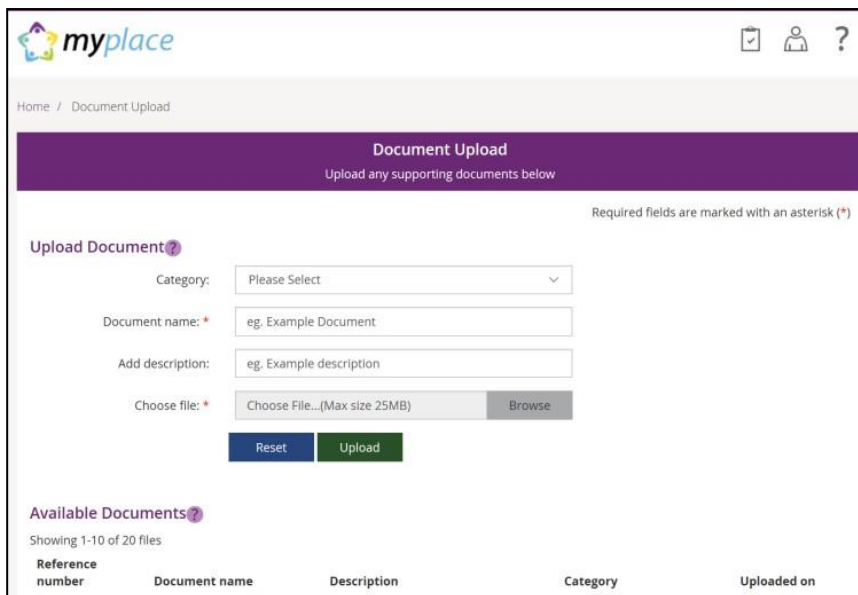
This screen is where you can send copies of documents to the NDIS.

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

1. Click the **Document Upload** tile on the homepage.



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



3. In the **Category** field, select from the drop down list.

The screenshot shows the 'Document Upload' form with the 'Category' dropdown menu open. The menu lists the following options: Please Select, Invoice, Receipt, Progress Report, AT Assessment, Quote - Service Provision, Supporting Evidence Form, Supporting Evidence Form - Child under 6, Nominee Request, Evidence of Disability, Access Request, Feedback, and Other. The 'Please Select' option is currently selected.

4. In the **Document name** field, type the name of the document. Ensure the document name captures the main purpose of the document.
5. In the **Add description** field, type a description of the file. Ensure the description is connected to the content within the document.
6. Select **Browse** to find the file you want to upload from your computer.

Note: you can only upload a maximum file size of 25MB (Megabytes) per upload.

The screenshot shows the 'Document Upload' form with the 'Document name', 'Add description', and 'Choose file' fields highlighted in a red box. The 'Document name' field contains 'eg. Example Document', the 'Add description' field contains 'eg. Example description', and the 'Choose file' field shows a 'Choose File...(Max size 10MB)' button and a 'Browse' button. The 'Upload' button is also visible.

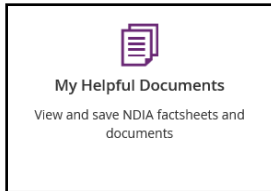
7. Once you have selected the file, click the **Upload** button to send the document to the NDIA.
8. Successfully uploaded documents are visible under the **Available Documents** section. The documents are displayed from the most recent date.

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 NDIA on **1800 800 110**.

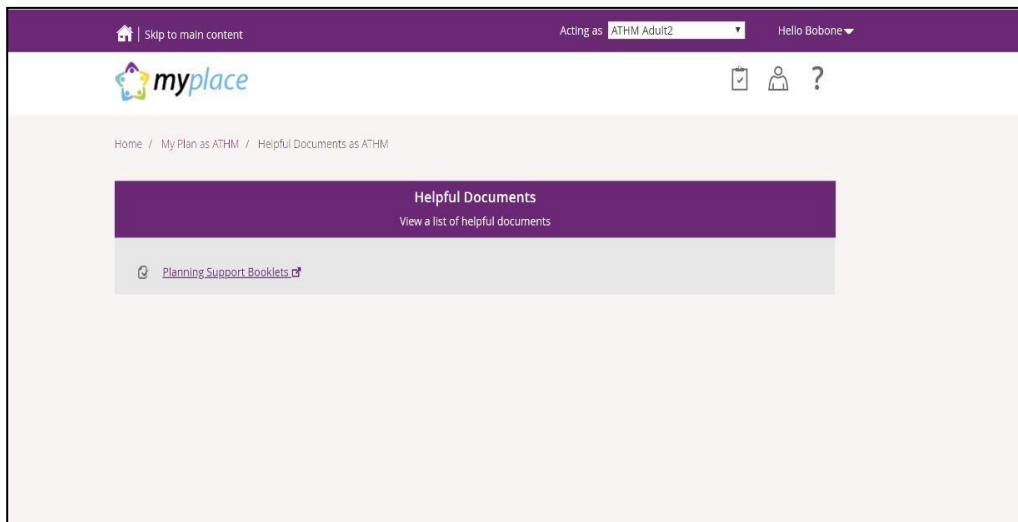
My Helpful Documents

This screen is where you can access helpful guides and resources.

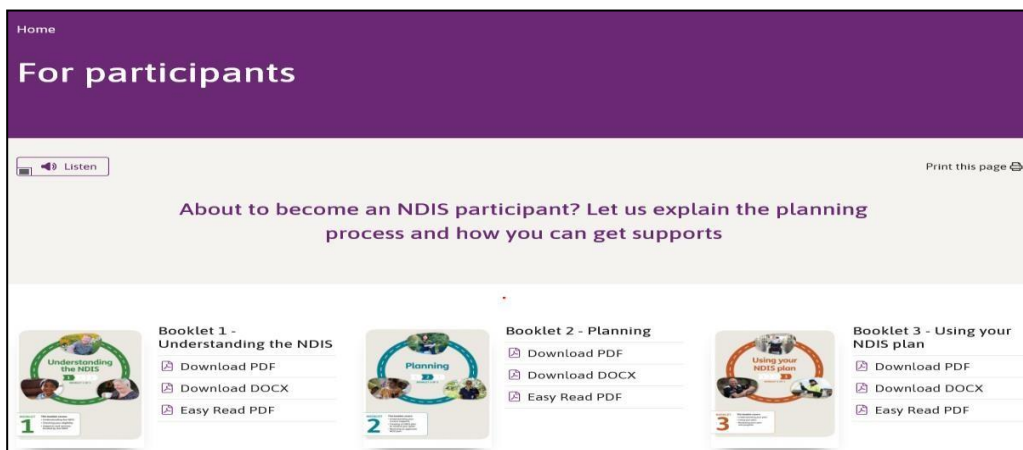
1. Select **My Helpful Documents** tile on your homepage



2. **Planning Support Booklets** hyperlink will display



3. Click on the **Planning Support Booklets** hyperlink
4. This will direct you to the 'For participants' page in the NDIS participant website
5. The 'For participants' page will display



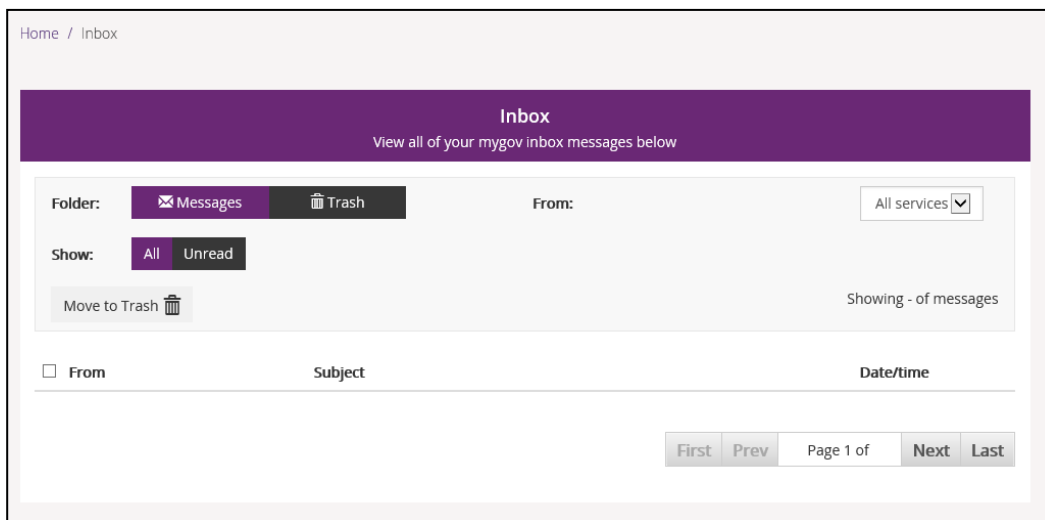
6. You will be able to select and view each booklet.

myGov Inbox

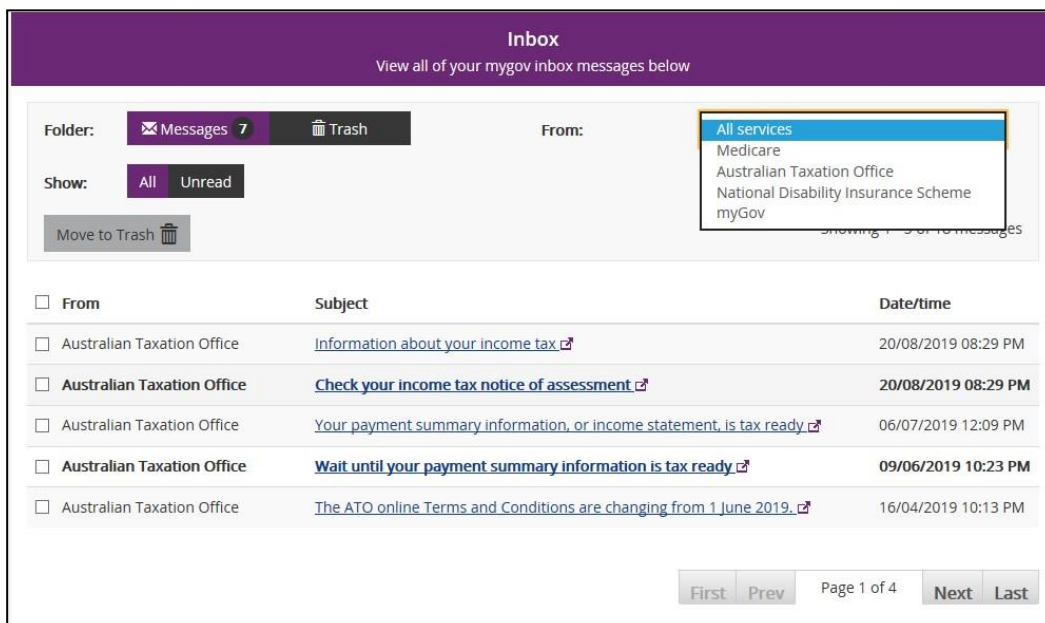
You can view all your myGov messages in the **myGov Inbox**.



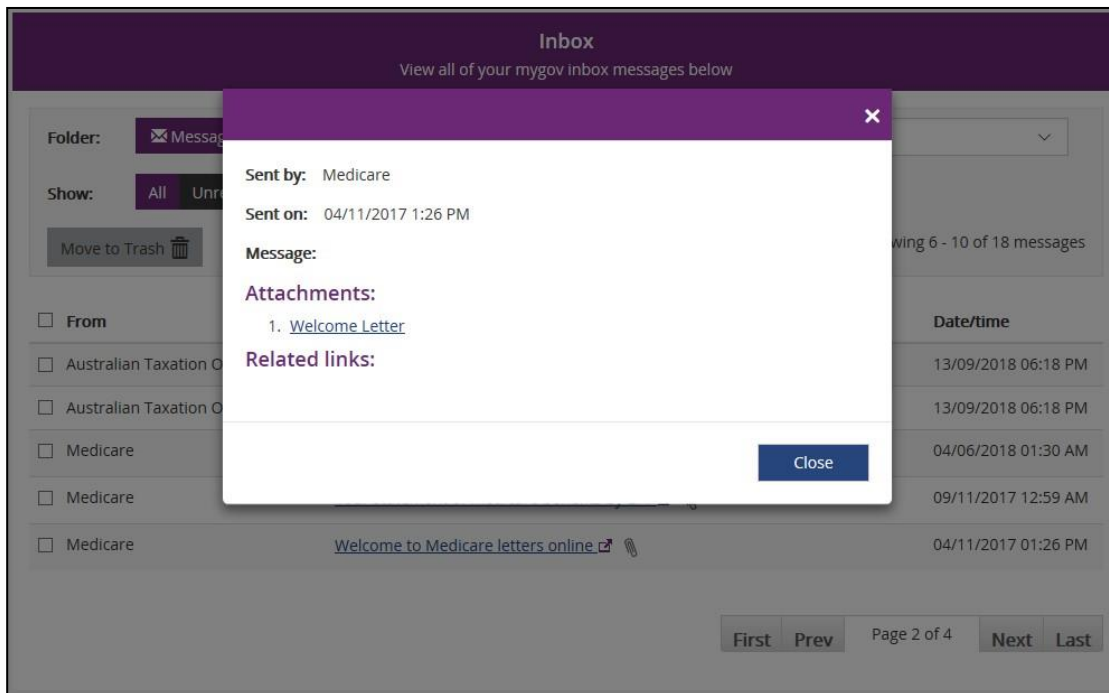
1. Select the **myGov Inbox** tile on your homepage.
2. Your myGov inbox displays all messages you have in your myGov account.



3. Select the **From** dropdown to view specific messages.



4. Select **Unread** in the **Show** field to only display unread messages.
5. To read a message, click on the message subject hyperlink.
The message displays.



6. Select **Close** to return to the Inbox screen.
7. If you want to move a message to trash, click in the tick box next to the message and then select **Move to Trash**.
8. Select **Home** to return to the myplace homepage.

My Service Booking

Service bookings are used to set aside funding for an NDIS registered provider for a support or service they will deliver. The provider can then claim payments against the service booking. A service booking will show the type of support to be provided, the length of time it is needed, and sets aside funding to pay for the support or service. Service bookings can be made by you, your nominee or a NDIS registered provider (with your consent). Self-managing supports do **not** have a service booking. If your plan is 100% self-managed, you do not need to go over this section.

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 portal.

Service Bookings with different Funds Management

If your NDIS funds are self-managed

You don't use service bookings because you pay your providers directly.

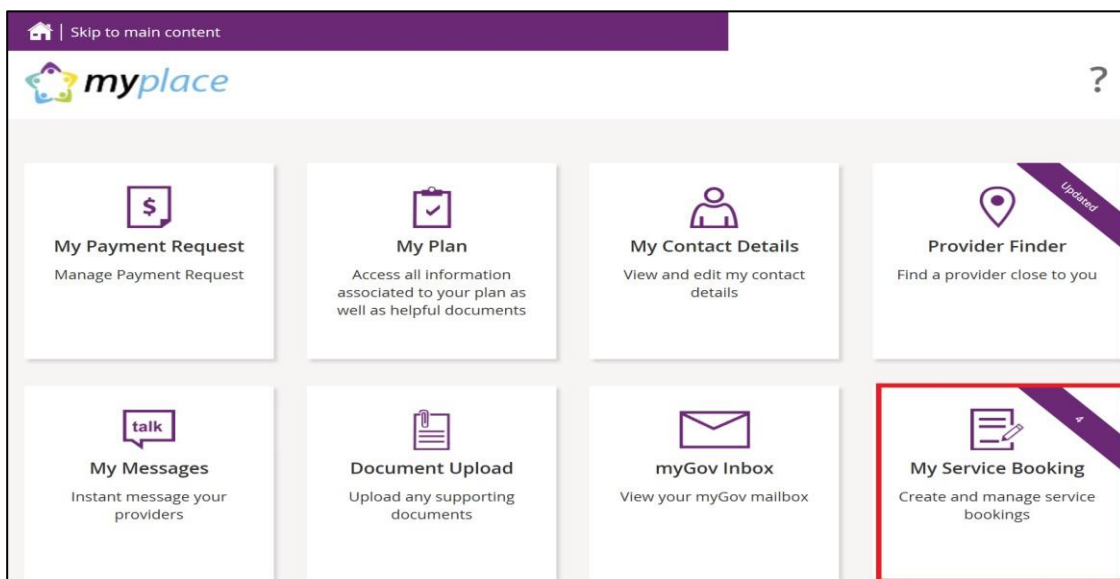
If your NDIS funds are plan-managed

Your Plan Manager will make one service booking, which allows the Plan Manager to claim payment from the NDIS for all services and supports in your plan. In this case, both NDIS registered and unregistered providers can be included in the service booking.

If your NDIS funds are Agency-managed

You will need to give your NDIS registered service providers your NDIS number and the relevant support areas you have been funded for, so your provider/s can create the service booking on your behalf and receive payment.

1. Select the **My Service Booking** tile from the home page.



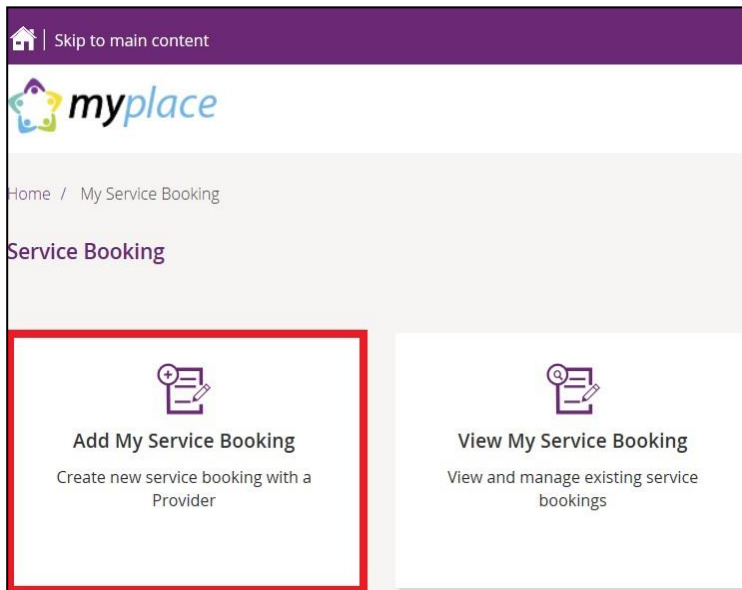
The Service Booking page displays. You have two tiles:

- Add My Service Booking
- View My Service Booking

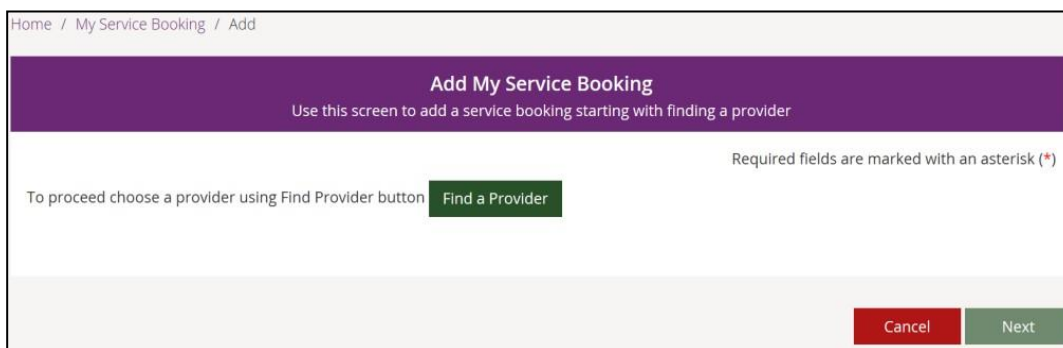
Add My Service Booking

You only add service bookings for supports that are Agency-managed. Your provider may have already created a service booking on your behalf, so check with them first.

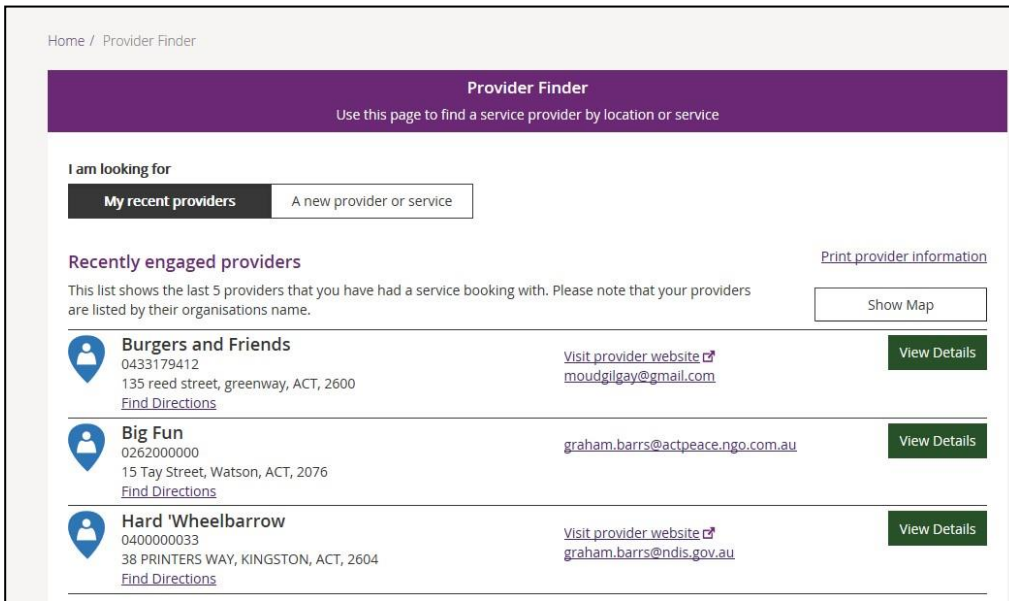
1. Select the **Add My Service Booking** tile.



2. Select the **Find the Provider** button to choose your provider.

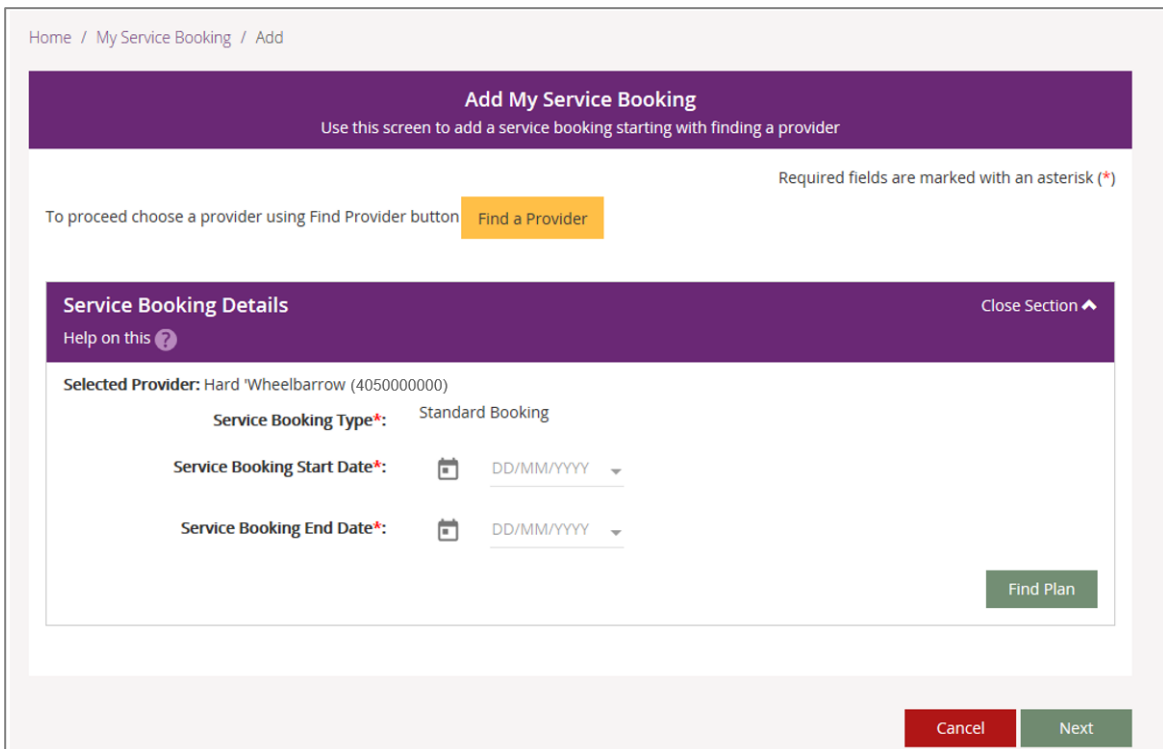


You are moved to the **Provider Finder** section of the portal.



3. Once you have found the provider, select **View Details** of the provider and then click the **Create Service Booking** button. If you need help, go to **Part 4 – Provider Finder and documents** guide (<https://www.ndis.gov.au/participants/using-your-plan/managing-your-plan>).

You are returned to the **Add My Service Booking** section.



4. Enter the **Start Date** and **End Date** of the service booking. **Note:** these dates must be within the start and end dates of the current plan.
5. Select the **Find Plan** button.

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

Close Section ▲

Help on this ?

Selected Provider: Manishs Wheelchairs (4050000000)

Service Booking Type*: Standard Booking

Service Booking Start Date*:

Service Booking End Date*:

Find Plan

Step 2: Select Plan

Close Section ▲

Help on this ?

Select *	Plan ID	Start Date	End Date
<input type="radio"/>	1010101	09/03/2018	09/03/2019

Cancel
Next

6. **Step 2: Select Plan** displays. Select the radio button next to the plan.

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

To proceed choose a provider using Find Provider button [Find a Provider](#)

Required fields are marked with an asterisk (*)

Service Booking Details
Help on this ?

Selected Provider: Burgers and Friends (4050000000)

Service Booking Type*: Standard Booking

Service Booking Start Date*: 23/10/2019

Service Booking End Date*: 25/10/2019

[Find Plan](#)

Step 2: Select Plan
Help on this ?

Select *	Plan ID	Start Date	End Date
<input checked="" type="radio"/>	1010101	03/12/2018	03/12/2019

Step 3: Support Details
Help on this ?

Support Budget*: Please select

Item Number:

Allocated Amount: \$0.00

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

Added Details
Help on this ?

No.	Support Budget	Support Item Number	Support Item Name	Quantity	Allocated Amount	Action
No Support Item						

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

Step 3: Support Details and **Added Details** display.

Step 2: Select Plan
Help on this ?

Select *	Plan ID	Start Date	End Date
<input checked="" type="radio"/>	1010101	24/01/2020	23/01/2022

Step 3: Support Details
Help on this ?

Support Budget*: Please select

Item Number:

Allocated Amount: \$0.00

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

Added Details
Help on this ?

No.	Support Budget	Support Item Number	Support Item Name	Quantity	Allocated Amount	Action
No Support Item						

7. The **Support Budget** displays the categories of funded supports in your NDIS Plan. Select the category from the drop down list and enter the **Allocated Amount**. Once completed, click the **Add** button.

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 Close Section ^

Help on this ?

Selected Provider: Burgers and Friends (4050000000)

Service Booking Type*: Standard Booking

Service Booking Start Date*:

Service Booking End Date*:

Find Plan

Step 2: Select Plan Close Section ^

Help on this ?

Select *	Plan ID	Start Date	End Date
●	1010101	03/12/2018	03/12/2019

Step 3: Support Details Close Section ^

Help on this ?

Support Budget*: **Item Number:**

Allocated Amount:

Reset Add

Added Details Close Section ^

Help on this ?

No.	Support Budget	Support Item Number	Support Item Name	Quantity	Allocated Amount	Action
No Support Item						

Cancel Next

Generally, you are not required to select an **Item Number** (this is a specific item within the support category) unless discussed with your provider. If you do specify the **Item**, the **Allocated Amount** is the agreed rate for that item. You will then enter the quantity of services needed.

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 (4050000000)

Service Booking Type*: Standard Booking

Service Booking Start Date*:

Service Booking End Date*:

[Find Plan](#)

Step 2: Select Plan

Help on this ?

Select *	Plan ID	Start Date	End Date
<input checked="" type="radio"/>	1010101	09/03/2018	09/03/2019

Step 3: Support Details

Help on this ?

Support Budget*:

Item Number:

Allocated Amount:

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

Added Details

Help on this ?

No.	Support Budget	Support Item Number	Support Item Name	Quantity	Allocated Amount	Action
No Support Item						

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

- 8. To add more supports under the same provider, return to **Step 7**.
- 9. If you need to make changes, click the **Edit** link to amend a support, or the **Remove** link to delete a support.

Close Section ▲

Step 3: Support Details

Help on this ?

Support Budget*: Item Number:

Allocated Amount: [Reset](#) [Add](#)

Close Section ▲

Added Details

Help on this ?

No.	Support Budget	Support Item Number	Support Item Name	Quantity	Allocated Amount	Action
1	Consumables	-	-	-	\$1,000.00	Edit Remove

Cancel
Next

- 10. Once all supports are added, click **Next**.

Close Section ▲

Step 3: Support Details

Help on this ?

Support Budget*: Item Number:

Allocated Amount: [Reset](#) [Add](#)

Close Section ▲

Added Details

Help on this ?

No.	Support Budget	Support Item Number	Support Item Name	Quantity	Allocated Amount	Action
1	Consumables	-	-	-	\$1,000.00	Edit Remove

Cancel
Next

The Review screen displays.

Home / My Service Booking / Add / Review

Review
 Review the selected service booking details below

Support Booking Details

Provider Name (NDIS Number)	Type	Start Date	End Date	Total Allocated Amount	In-Kind Program	Action
Manish Wheelchairs (4050000000)	Standard Booking	09/03/2018	15/03/2018	\$15.00	-	Edit

Support Details

No.	Support Budget	Support Item Number	Support Item Name	Quantity	Allocated Amount
1	Social,Community and Civic Participation	04_103_0125_6_1	ass to access community, social and rec activities - indiv-per weekday evening	5	\$3.00

Comments:

Back
Submit

11. Notes may be added in the **comments** section. The provider will see these comments.
12. Select the **Submit** button to create the service booking

A service booking confirmation message displays.

Home / My Service Booking / Add / Review / Confirmation

Confirmation

Your Service booking has been successfully submitted.

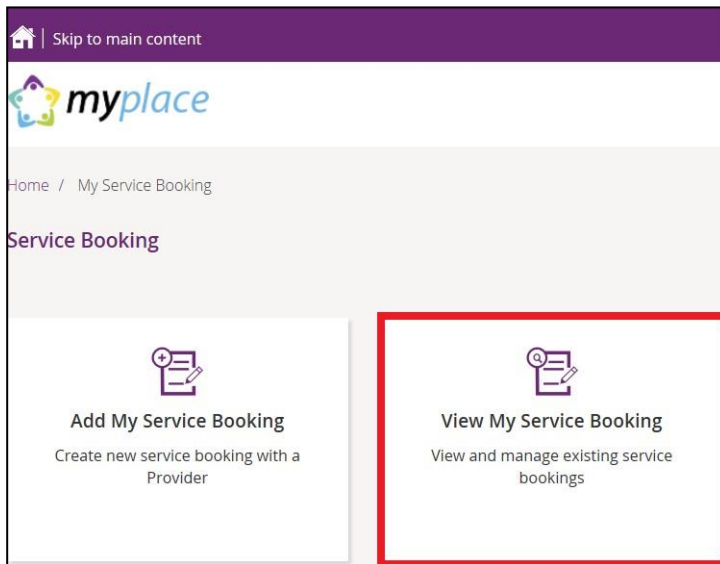
View Service Bookings

Select **View Service Bookings** to see the details of any of your service bookings.

Note: The status of the service booking you have created is **Awaiting Provider Review**. When the provider accepts the booking, the status will show as **Active**. If your provider rejects the booking, the service booking status will show as **Rejected**. The reason for rejection can be seen in the **View Service Booking Details** screen.

View Existing Bookings

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



Your service bookings display.

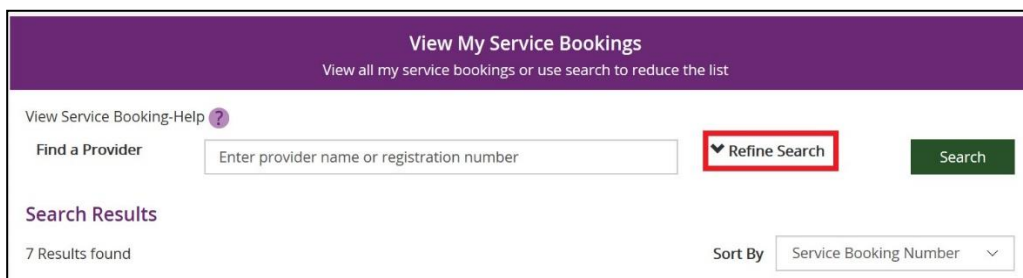
The screenshot shows the 'View My Service Bookings' page. At the top, there is a purple header with the text 'View My Service Bookings' and 'View your existing Service Bookings'. Below this is a search bar with the text 'Find a Provider' and 'Enter provider name or registration number'. There is a 'Refine Search' dropdown and a 'Search' button. Below the search bar is a 'Search Results' section with a 'Results found' indicator and a 'Sort By' dropdown set to 'Service Booking Number'. The main content is a table with the following data:

Service Booking Number	Service Booking Type	Provider Name (Registration Number)	Start Date	End Date	Submitted Date	Service Booking Status	Initiated By
50014413	Standard Booking	[Redacted]	13/07/2018	27/07/2018	13/07/2018	Change Awaiting Provider	Participant
50012364	Standard Booking	[Redacted]	14/04/2018	19/04/2018	11/04/2018	Inactive	Provider

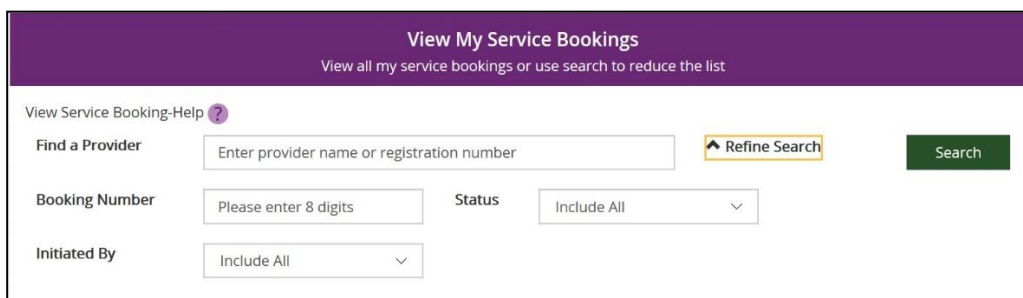
At the bottom of the table, there are navigation buttons: 'Back', 'First', 'Prev', 'Page 1 of 2', 'Next', and 'Last'.

Refine Search

1. You can search by a provider or to expand the search criteria, click the **Refine Search** button.



The screenshot shows the 'View My Service Bookings' page. At the top, there is a purple header with the text 'View My Service Bookings' and 'View all my service bookings or use search to reduce the list'. Below the header, there is a search section with a 'Find a Provider' label, a text input field containing 'Enter provider name or registration number', a 'Refine Search' button (highlighted with a red box), and a 'Search' button. Below the search section, there is a 'Search Results' section with '7 Results found' and a 'Sort By' dropdown menu set to 'Service Booking Number'.



The screenshot shows the 'View My Service Bookings' page with additional filters. The 'Refine Search' button is highlighted with a yellow box. Below the search section, there are three filter sections: 'Booking Number' with a text input field containing 'Please enter 8 digits', 'Status' with a dropdown menu set to 'Include All', and 'Initiated By' with a dropdown menu set to 'Include All'.

You can search by:

- **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.
2. Once you have entered your search criteria, select **Search**.
 3. You can sort your search results by clicking the **Sort By** drop down field. The options are:
 - Initiated by
 - Service Booking Number
 - Service Booking Start Date
 - Service Booking End date
 - Submitted Date
 - Service Booking Status

View My Service Bookings
View all my service bookings or use search to reduce the list

View Service Booking-Help ?

Find a Provider ^ Refine Search

Booking Number **Status**

Initiated By

Search Results
7 Results found

Sort by:

- Initiated By
- Service Booking Number
- Service Booking Start Date
- Service Booking End Date
- Submitted Date
- Service Booking Status

Service Booking Number	Service Booking Type	Provider Name (Registration Number)	Start Date	End Date	Submitted Date

4. To view details of a service booking, click on the **Service Booking Number**.

View My Service Bookings
View your existing Service Bookings

View Service Booking-Help ?

Find a Provider v Refine Search

Search Results
2 Results found

Sort By

Service Booking Number	Service Booking Type	Provider Name (Registration Number)	Start Date	End Date	Submitted Date	Service Booking Status	Initiated By
50014413	Standard Booking		13/07/2018	27/07/2018	13/07/2018	Change Awaiting Provider	Participant
50012215	Standard Booking		09/03/2018	24/03/2018	09/03/2018	Change Awaiting Provider	Participant

Page 1 of 1

5. If the status is 'awaiting provider review' you can delete the service booking by selecting **Delete**. Once a service booking has been accepted by the provider it cannot be deleted.

View Service Booking Details
Detailed view of the selected service booking

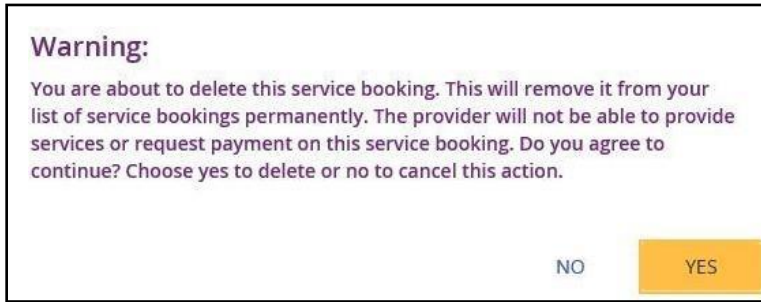
Service Booking Details

Provider Name (NDIS Number)	Type	Number	Start Date	End Date	Revised End Date	Total	In-Kind Program	Status
Manishs Wheelchairs (4050000000)	Standard Booking	50015058	06/08/2018	20/08/2018	-	\$1.00	-	Awaiting Provider Review

Support Details

No.	Support Budget	Support Item Number	Support Item Name	Quantity	Revised Quantity	Allocated Amount (Unit Price)	Revised Allocated Amount (Unit Price)	Revised Amount	Remaining Amount
1	Social,Community and Civic Participation	-	-	1	-	\$1.00	-	-	\$1.00

- Once you select **Delete**, the following warning message displays.



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



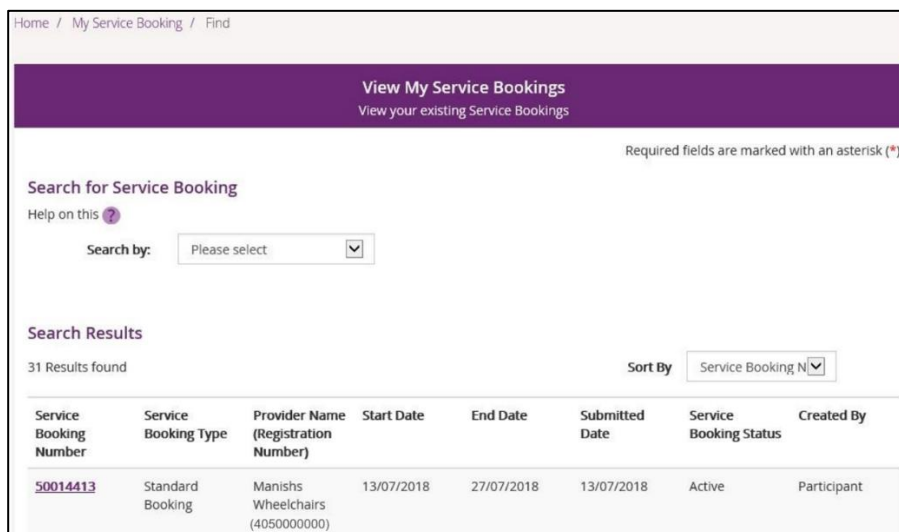
You are returned to the **View My Service Bookings** page.

Edit a Service Booking

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

Change the dollar values in a Service Booking

- Click the **View My Service Bookings** tile on the **Service Bookings** page.
- Click the **Service Booking Number of the booking you wish to edit**.



- Click the **Request Update Allocation** button in the bottom right hand corner of the window.

Provider Name (NDIS Number)	Type	Number	Start Date	End Date	Revised End Date	Total	In-Kind Program	Status
Hard Wheelbarrow (4050000000)	Standard Booking	50023252	22/05/2019	22/06/2019	-	\$108.00	-	Inactive

Support Details

No.	Support Budget	Support Item Number	Support Item Name	Quantity	Revised Quantity	Allocated Amount (Unit Price)	Revised Allocated Amount (Unit Price)	Revised Amount	Remaining Amount
1	Daily Activities	01_021_012_0_1_1	Linen Service	2	-	\$54.00	-	-	\$108.00

[Back](#)
[Request Update Allocation](#)

The **Request Update Allocation** page will display.

Home / Service Bookings / Find / View / Request Update Allocation

Request to Update Allocation
Add the Revised Quantity and Revised Unit Price, then Submit. Please ask the provider to review and accept your changes

Service Booking Details

Provider Name (Reference Number)	Service Booking Type	Service Booking Number	Start Date	Current End Date	Total Allocated Amount	Total Remaining Amount	Status
Manish Wheelchairs (4050000000)	Standard Booking	50014413	13/07/2018	27/07/2018	\$0.01	\$0.01	Active

Support Details

No.	Support Budget	Support Item Number	Support Item Name	Quantity	Allocated Amount (Unit Price)	Remaining Amount	Revised Quantity	Revised Unit Price
1	Social, Community and Civic Participation	-	-	1	\$0.01	\$0.01	<input type="text" value="1"/>	<input type="text" value="\$0.00"/>

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

4. Enter the **Revised Quantity** and **Revised Unit Price** and then select **Submit**.

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

- Click the **Back** button to return to the **View My Service Bookings** page.

✓ 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 (4050000000)	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](#)

The status of the service booking will change 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**.

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:

Search Results

31 Results found Sort By:

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 (4050000000)	13/07/2018	27/07/2018	13/07/2018	Active	Participant

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

“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.”

End Service Booking

You can request to end a service booking with an active status that was created by the NDIA, your provider or yourself. The service booking will not be ended until your service provider accepts your request to end the service booking.

1. Select **View My Service Bookings** and click the Service Booking Number of the booking you wish to end.
2. Select **Request End Date Change** to end the service booking.

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 (4050000000)	Standard Booking	50014413	13/07/2018	27/07/2018	-	\$0.01	-	Active

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	-	\$0.01	-	\$0.01

Back

Request End Date Change

Request Update Allocation

3. Enter the **Service Booking End Date** and select a **Reason for Change** from the drop down list.

Home / Service Bookings / Find / View / Request End Date Change

Request End Date Change

Update the Service Booking end date. Please ask the provider to review and accept your change

The new service booking end date will be applied as soon as the provider accepts the change

Service Booking Details

Provider Name (NDIS Number)	Service Booking Type	Service Booking Number	Start Date	Current End Date	Total Allocated Amount	Total Remaining Amount	Status
Manishs Wheelchairs (4050000000)	Standard Booking	50014413	13/07/2018	27/07/2018	\$0.01	\$0.01	Active

Update End Date

Service Booking End Date*: 13/07/2018 Reason for Change*:

4. Click the **Submit** button in the bottom right hand corner of the window.
5. An alert message displays confirming you want to continue. If you want to ending the service booking click **Yes**. If not, click **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?

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 (4050000000)	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

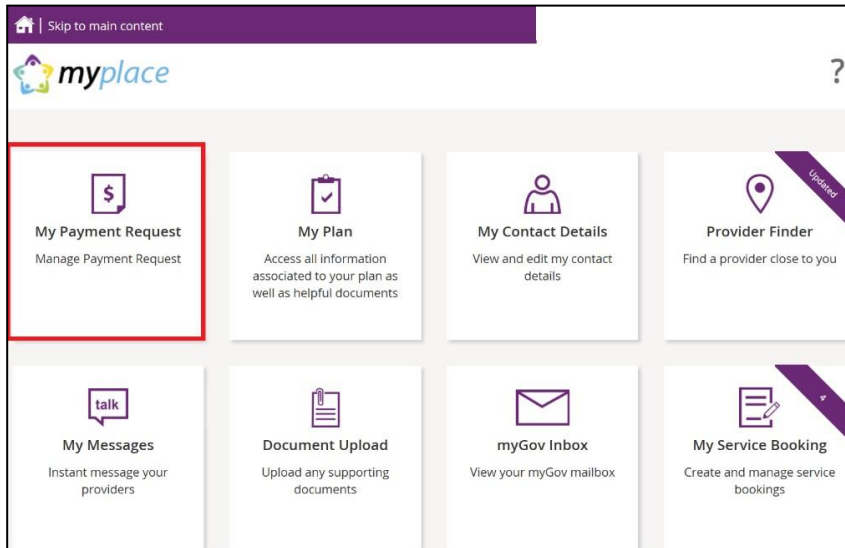
[Back](#)

The status of the service booking will change to **Change Awaiting Provider Review**. This means the provider can accept or reject the changes you have made. **When** the service booking ends the status will show as **Inactive**. If the provider rejects your change for whatever reason, the status will show as **Active** and you will need to contact the provider.¹

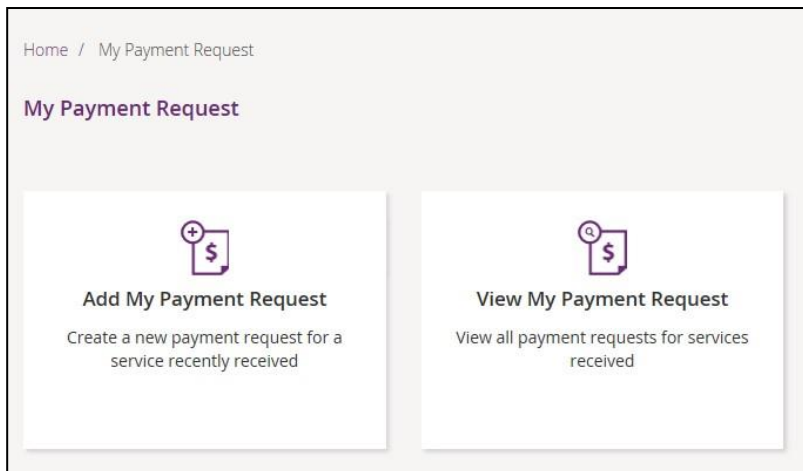
My Payment Request

Through **My Payment Request** you can create payment requests (only for self-managed participants) and view all past payment requests (including periodic transport).

1. Click **My Payment Request** on the homepage



The **My Payment Request** screen displays.



You have two tiles:

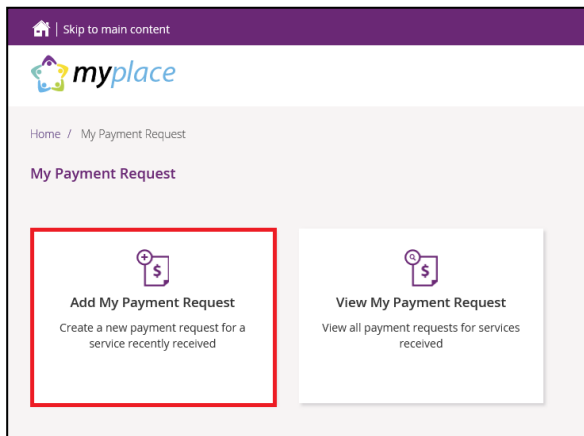
- **Add My Payment Request** – to create new payment requests.
- **View My Payment Request** – to see the details of all payment requests that have been submitted.

Add My Payment Request

This section is only for self-managed funded supports. Payment requests for funding that is Agency managed or Plan managed will be submitted by providers.

Ensure you have your bank account details recorded (in **My Contact Details**) before you submit your payment request.

1. Click the **Add My Payment Request** tile on the **My Payment Request** screen.



The **Add Payment Request** screen displays.

2. Enter the details of your payment request. The **Support Start Date** field and **Support End Date** field will default to today's date (change if required). Select the **Support Category** and **Claim Type** from the drop down list and enter the **Payment Amount**.

- To help you track your payments, please enter the name of the payee in the **Provider, Business or Person** field and the **Description** of the payment. The provider, business or person name and description field are both optional fields.

Note: For more than one payment request, click the **Add Another** button in the lower right hand corner of the window.

The screenshot shows the 'Add Payment Request' form. The title bar is purple with the text 'Add Payment Request' and 'Please enter the details of your payment request'. Below the title bar, there is a sub-header 'Payment Request Details' and a link 'New Payment Request - Help ?'. The form contains several fields: 'Support Start Date' (23/06/2020), 'Support End Date' (23/06/2020), 'Support Category' (Please Select Category), 'Claim Type' (Direct service), 'Cancellation Reason' (empty), and 'Payment Amount' (eg. 0.00). There are also two text input fields for 'Provider, Business or Person' and 'Description'. At the bottom right, the 'Add Another' button is highlighted with a red box. At the bottom left is a 'Cancel' button and at the bottom right is a 'Next' button.

- Once all details have been entered, click the **Next** button on the lower right hand side of window.

This screenshot is identical to the previous one, showing the 'Add Payment Request' form. However, in this version, the 'Next' button at the bottom right is highlighted with a red box, indicating the next step in the process.

The **Preview** page displays.

Home / My Payment Request / Add / Preview

Preview

Please review your payment request before submitting

Payment Request Details

Support Start Date: 25/07/2018	Support End Date: 27/07/2018	Support Category: SOCIAL, COMMUNITY AND CIVIC PARTICIPATION
Claim Type: Standard	Cancellation Reason:	Payment Amount: \$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 NDIS plan. I understand that I may be audited by the NDIS 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**

5. Check the details are correct and then tick the **Declaration** box. Click the **Submit** button on the bottom right hand side of screen.
6. The **Confirmation** screen displays, stating that your payment request has been received.

Confirmation

Your Payment Requests have been received

Payment Request Details

Payment Request #	Request Number	Support Budget	Claim Type	Cancellation Reason	Support Start Date	Support End Date	Payment Total	Status	Rejection Reason
1	10271638	Consumables	Direct service		10/03/2020	10/03/2020	\$150.00	Pending Payment	

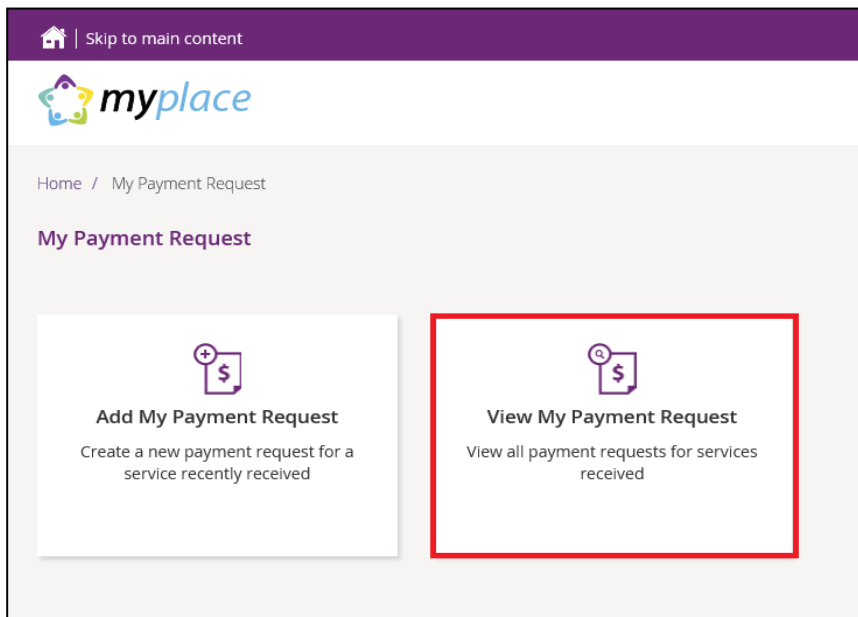
View Payment Requests

You can return to the home page or go to **View Payment Requests**.

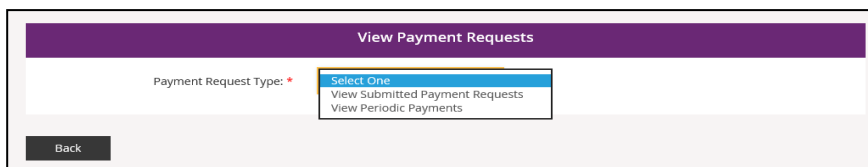
View My Payment Requests

You can view the payment requests that were submitted by you, a provider or an NDIA staff member. Periodic transport payments can also be viewed in this screen.

1. Click the **My Payment Request** tile on the home page.
2. Select the **View My Payment Request** tile.



The **View Payment Requests** page displays.



3. Choose the **Payment Request Type** from the drop down menu. The following steps are an example for submitted payment requests.

4. For **View Submitted Payment Requests**, the following screen displays.

The screenshot shows the 'View Payment Requests' interface. At the top, there is a navigation bar with 'Skip to main content' and 'Hello Simpsons'. Below this is the 'myplace' logo and user icons. The main heading is 'View Payment Requests'. A note states 'Required fields are marked with an asterisk (*)'. The form contains:

- 'Payment Request Type: *' with a dropdown menu showing 'View Submitted Payment Requests'.
- 'Submitted date: *' with a text input field (DD/MM/YYYY), a calendar icon, and a help icon.
- 'Support start date: *' with a text input field (DD/MM/YYYY), a calendar icon, and a help icon.
- 'Support end date: *' with a text input field (DD/MM/YYYY), a calendar icon, and a help icon.
- 'Reset' and 'Search' buttons at the bottom right.
- 'Back' button at the bottom left.

5. Click the **Search** button for a full list of all requests, or type in dates to view payments within a selected time period. A list of your payment requests display.

Search Results - Submitted Claim

Showing 1 - 7 of 7 payment requests

Payment Request Number	Submitted Date	Support Category	Support Start Date	Support End Date	Payment Total	Status
10585554	19/08/2021	Consumables	19/08/2021	19/08/2021	\$10.00	Paid
10585555	19/08/2021	Initial Supports	19/08/2021	19/08/2021	\$10.00	Awaiting Approval
10585556	19/08/2021	Home Modifications	19/08/2021	19/08/2021	\$100.00	Awaiting Approval
10585646	19/08/2021	Social Community and Civic Participation	19/08/2021	19/08/2021	\$10.00	Awaiting Approval
10585660	19/08/2021	Support Coordination	19/08/2021	19/08/2021	\$10.00	Awaiting Approval
10585663	19/08/2021	Consumables	19/08/2021	19/08/2021	\$50.00	Awaiting Approval
10585664	19/08/2021	Support Coordination	19/08/2021	19/08/2021	\$20.00	Awaiting Approval

[Return to My Payment Request](#)

6. You can navigate through the payment request results by clicking the **First**, **Back**, **Next** and **Last** buttons.
7. Click on the **Payment Request Number** to view details about the payment request.

Note: You will see the Payee's ABN number (if applicable), when you or your representative have made a payment request using the my NDIS app or an NDIA staff member has made a claim on your behalf.

View Payment Request
View a list of your Payment Request.

Payment Request Summary
Help on this ?

Provider/Claimed By	Payment Request Number	Payment Amount	Status
Amar11082021 Self04 (430000000)	10585555	\$10.00	Awaiting Approval

Support Details

Start Date: 19/08/2021

End Date: 19/08/2021

Category: Initial Supports

Claim Type: Direct service

Cancellation Reason:

Amount: 10.00

Provider, Business or Person: hard wheelbarrow

Description: test description

Other Details

Submitted on: 19/08/2021

Submitted By: BUSINESS ADMIN11

Reject Reason:

Paid on:

Payee ABN: 61643018982

To support your payment request you may attach your invoice [Upload Document](#)

[Back to Payment Request](#)

Cancel Payment Requests

You can cancel payment requests you have submitted and payment requests that a nominee or child representative have submitted if they have the status of **Paid** and/or **Pending**.

Note:

- A Nominee or child representative can only cancel payment requests submitted by themselves
- You will see the Payee's ABN number (if applicable), when you or your representative have made a payment request using the my NDIS app or an NDIA staff member has made a claim on your behalf.

1. In **View Payment Requests**, click on the **Payment Request Number** link.

Search Results - Submitted Claim

Showing 1 - 7 of 7 payment requests

Payment Request Number	Submitted Date	Support Category	Support Start Date	Support End Date	Payment Total	Status
10585554	19/08/2021	Consumables	19/08/2021	19/08/2021	\$10.00	Paid
10585555	19/08/2021	Initial Supports	19/08/2021	19/08/2021	\$10.00	Awaiting Approval
10585556	19/08/2021	Home Modifications	19/08/2021	19/08/2021	\$100.00	Awaiting Approval
10585646	19/08/2021	Social Community and Civic Participation	19/08/2021	19/08/2021	\$10.00	Awaiting Approval
10585660	19/08/2021	Support Coordination	19/08/2021	19/08/2021	\$10.00	Awaiting Approval
10585663	19/08/2021	Consumables	19/08/2021	19/08/2021	\$50.00	Awaiting Approval
10585664	19/08/2021	Support Coordination	19/08/2021	19/08/2021	\$20.00	Awaiting Approval

[Return to My Payment Request](#)

Search Results - Submitted Claim

Showing 1 - 7 of 7 payment requests

Payment Request Number	Submitted Date	Support Category	Support Start Date	Support End Date	Payment Total	Status
10585554	19/08/2021	Consumables	19/08/2021	19/08/2021	\$10.00	Paid
10585555	19/08/2021	Initial Supports	19/08/2021	19/08/2021	\$10.00	Awaiting Approval
10585556	19/08/2021	Home Modifications	19/08/2021	19/08/2021	\$100.00	Awaiting Approval
10585646	19/08/2021	Social Community and Civic Participation	19/08/2021	19/08/2021	\$10.00	Awaiting Approval
10585660	19/08/2021	Support Coordination	19/08/2021	19/08/2021	\$10.00	Awaiting Approval
10585663	19/08/2021	Consumables	19/08/2021	19/08/2021	\$50.00	Awaiting Approval
10585664	19/08/2021	Support Coordination	19/08/2021	19/08/2021	\$20.00	Awaiting Approval

[Return to My Payment Request](#)

2. A summary of the payment request displays.

View Payment Request
View a list of your Payment Request.

Payment Request Summary
Help on this ?

Provider/Claimed By	Payment Request Number	Payment Amount	Status
Amar11082021 Self04 (430000000)	10585554	\$10.00	Paid

Support Details

Start Date: 19/08/2021

End Date: 19/08/2021

Category: Consumables

Claim Type: Direct service

Cancellation Reason: Amount: 10.00

Provider, Business or Person: Hard Wheelbarrow

Description: test description

Other Details

Submitted on: 19/08/2021

Submitted By: AMAR11082021 SELF04

Reject Reason: Paid on: 20/08/2021

Payee ABN: Not applicable

To support your payment request you may attach your invoice [Upload Document](#)

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

- Click the **Cancel Payment** button on the bottom right hand corner of the window.

Note: If the **Cancel Payment** button is not available, please contact NDIS.

View Payment Request
View a list of your Payment Request.

Payment Request Summary
Help on this ?

Provider/Claimed By	Payment Request Number	Payment Amount	Status
Amar11082021 Self04 (430000000)	10585554	\$10.00	Paid

Support Details

Start Date: 19/08/2021
End Date: 19/08/2021
Category: Consumables
Claim Type: Direct service
Cancellation Reason:
Amount: 10.00
Provider, Business or Person: Hard Wheelbarrow
Description: test description

Other Details

Submitted on: 19/08/2021
Submitted By: AMAR11082021 SELF04
Reject Reason:
Paid on: 20/08/2021
Payee ABN: Not applicable

To support your payment request you may attach your invoice Upload Document

Back to Payment Request
Cancel Payment

- Select the **Yes** button to cancel the payment request.

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

YES
NO

You are returned to the **View Payment Requests** page. A confirmation message will display, confirming the payment request has been cancelled successfully.

✓

You have successfully cancelled your payment request. If the payment request had a status of 'Paid' you will either receive an invoice from the NDIA, or the amount will be offset against future payment requests.

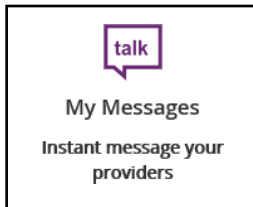
- Select **Home** to return to the main homepage.

Home /
 My Payment Request /
 View

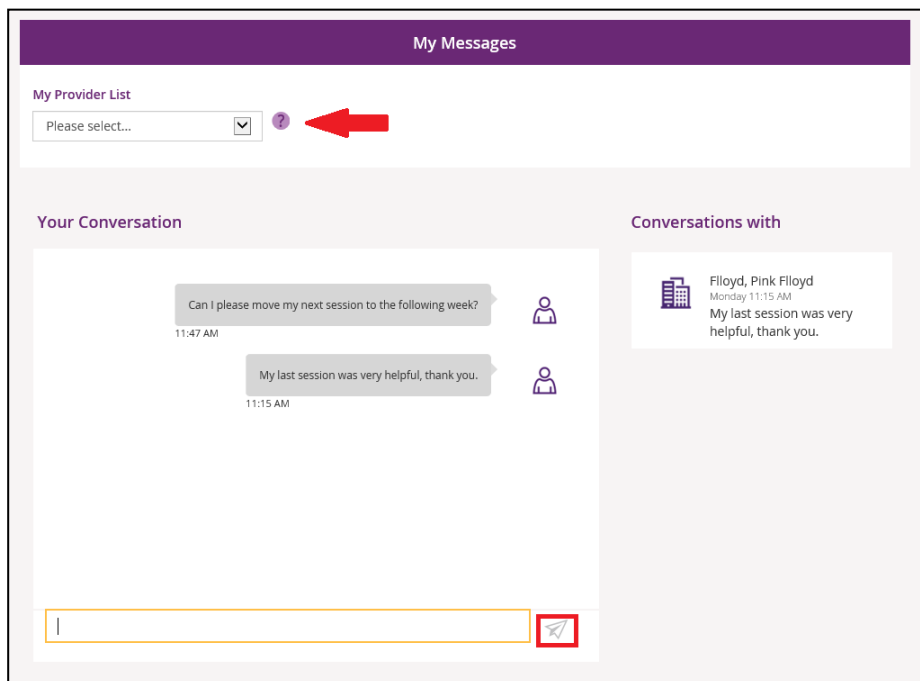
My Messages


This tile will only display if you have an active service booking with a registered provider. You can send instant messages to your providers.

1. Click on the **My Messages** tile on the home page.

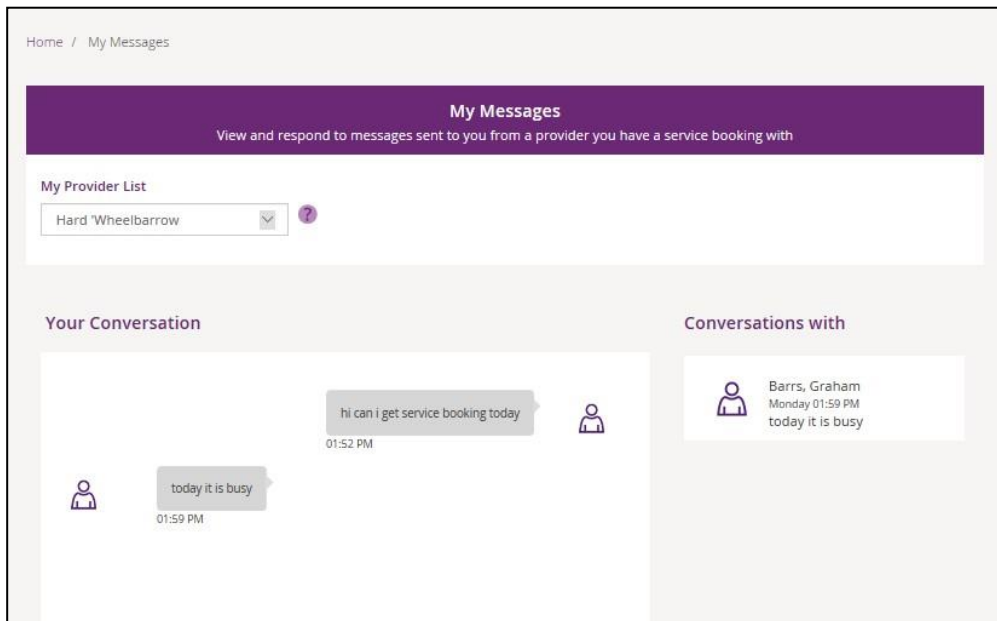


2. The **My Messages** page displays.



3. Select the chosen provider from the drop down list under **My Provider List**.
4. Type your message in the yellow box and click the paper plane icon  to send the message.

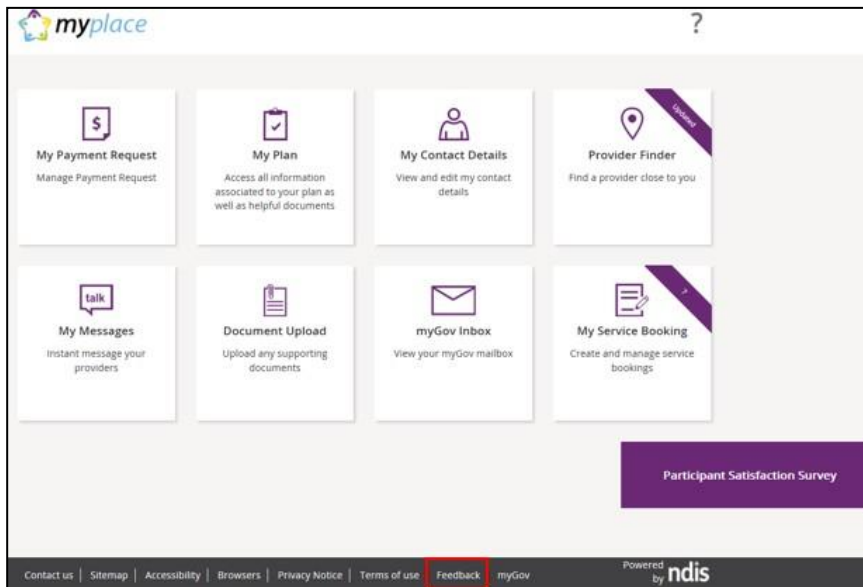
Note: Conversations (messages) will appear under the **Conversations with** tab. You can continue a conversation by selecting the providers' name.



Leaving Feedback

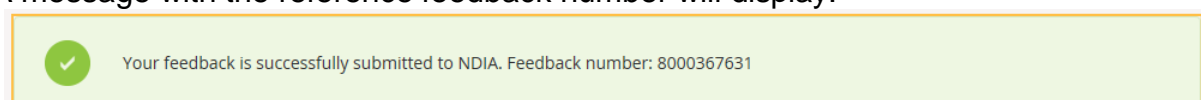
If you would like to provide feedback, a compliment, complaint or enquire about an internal review or external review, this section allows you to record your feedback and submit it to the agency.

1. From anywhere in the portal, click the **Feedback** link at the very bottom of the page.



The **Feedback Form** opens.

2. Enter a **Description** in the free text field and select a **Feedback Type** and **Primary Category** from the drop down lists. In the **Feedback Details** field provide as much information as possible to assist the staff with your enquiry.
3. Select the **Submit** button in the lower right hand corner of the screen.
4. A message with the reference feedback number will display.



Logging out of myplace

Once you have completed all your tasks within the portal, log out by clicking on the down arrow next to your name at the top of the screen and select **Logout** from the drop down menu.



If you signed in via the NDIS website, you will be returned to the NDIS front page. If you signed in via the myGov website, you will be returned to your myGov homepage.