

NDIS myplace portal

Step-by-step Guide

My Plan

May 2024



Table of Contents

Table of Contents.....	2
Changes from the last version	3
My Plan	3
My support budget	10
My Referrals.....	15

Changes from the last version

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

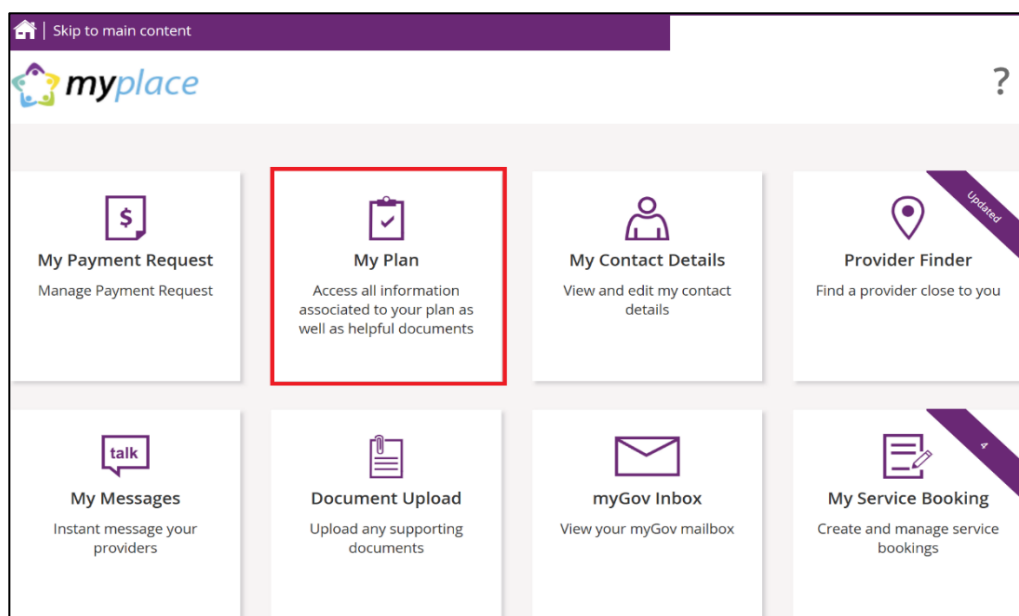
- General updates.

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.

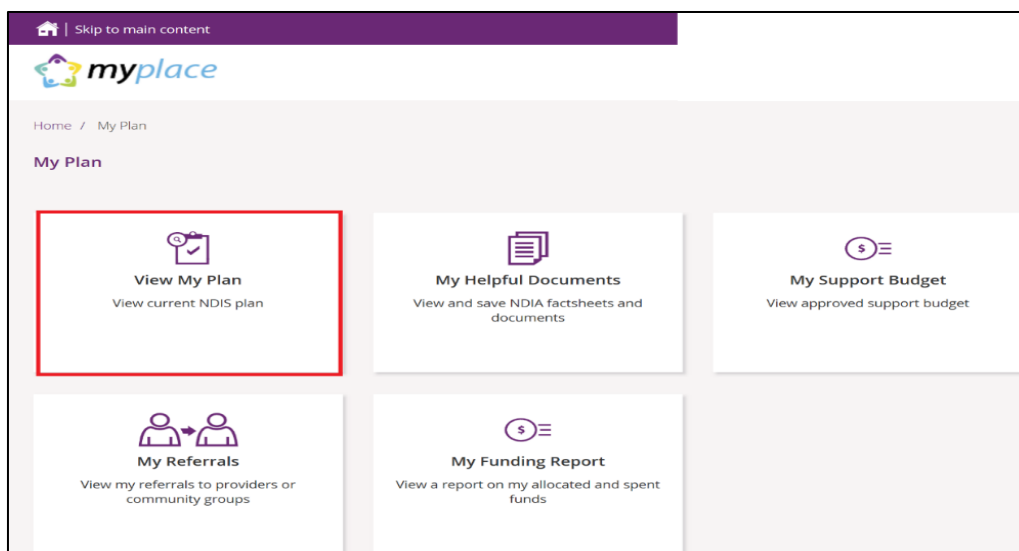
Note: If you have a new plan in our new computer system, you can only view your previous plan information in myplace portal. You need to sign in to the my NDIS portal to see your current plan information or your previous plan created in the NDIS business system.

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



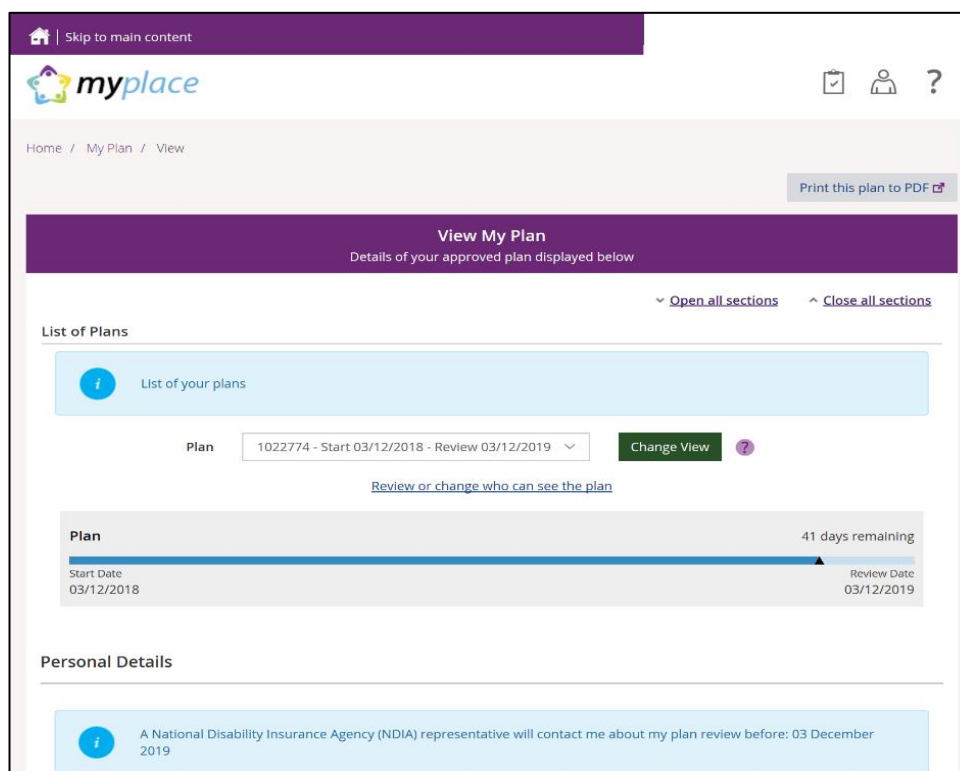
Once the **My Plan** tile opens, you will see the following tiles:

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

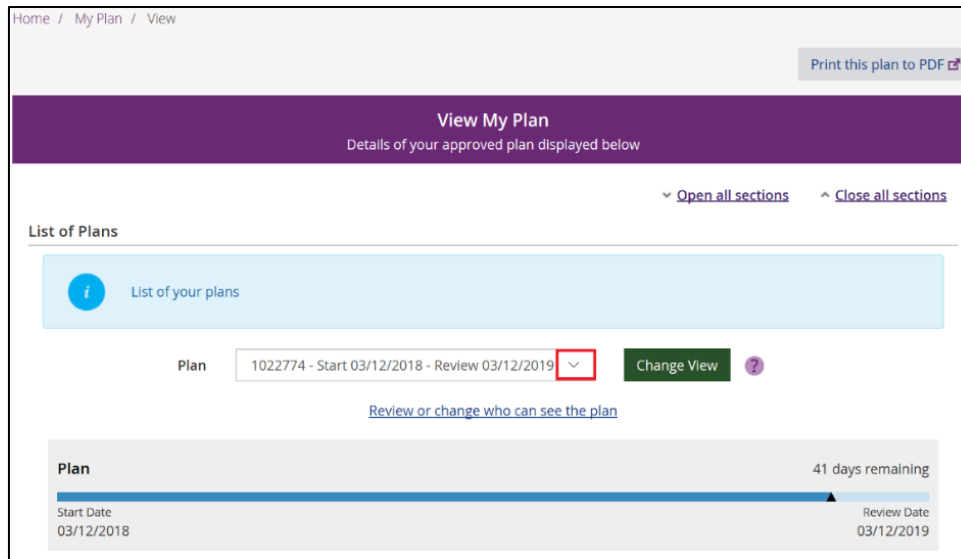


View my plan

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.

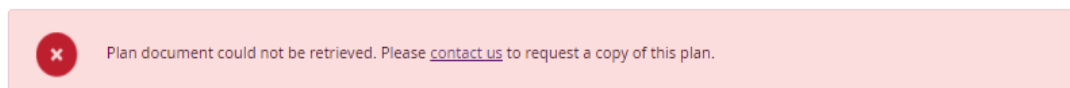


Note: To view a past plan, use the **Change View** button.

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'




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

View my plan: section 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 NDIS if you have any changes to your circumstances, which could change the supports you need to be included in your plan.

Personal Details



A National Disability Insurance Agency (NDIA) representative will contact me about my plan review before: 20 February 2020

NDIS Number

430213812

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](#) and other ways to contact the NDIS.

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.

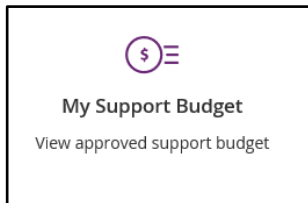
Home / My Plan / View

My support budget

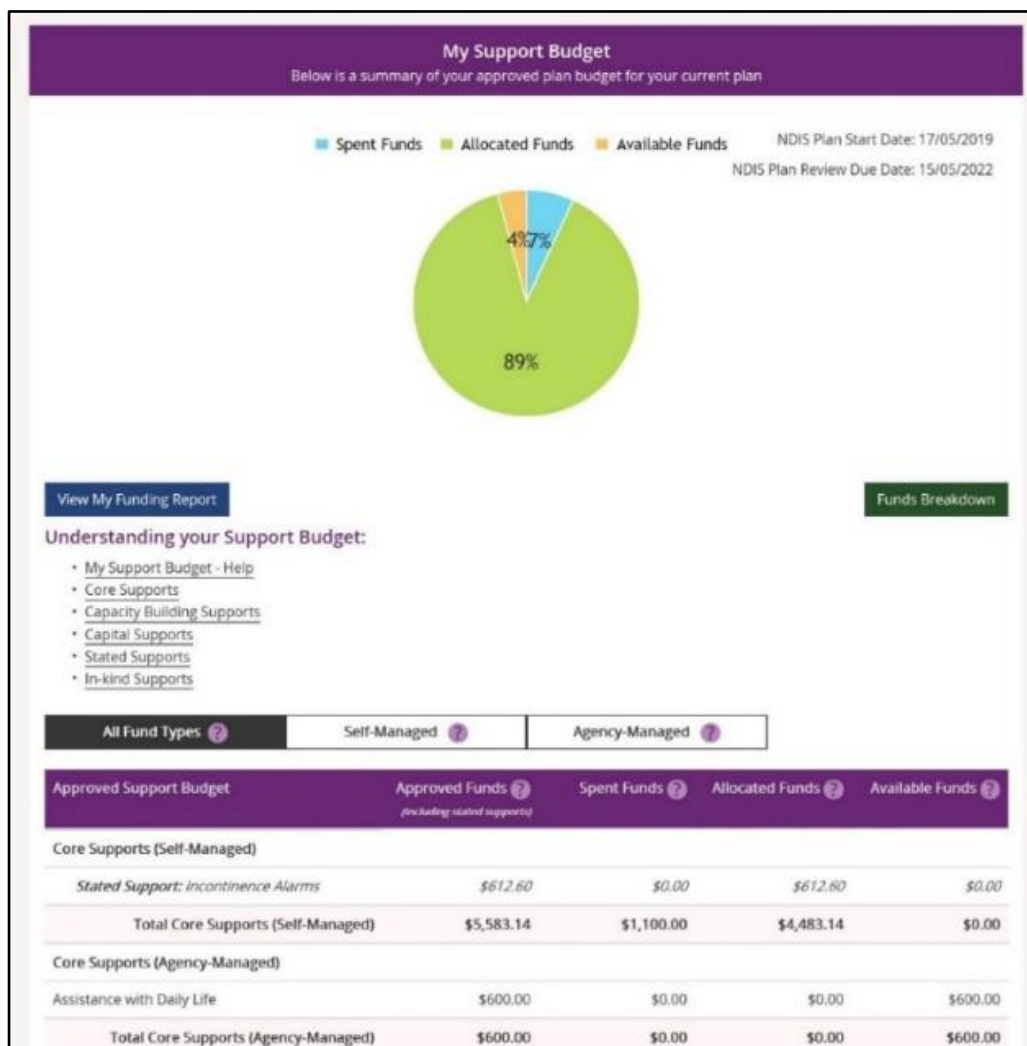
My Support Budget is a summary of your current plan support budget. You can compare your approved funds, allocated, spent and remaining budget. The budget is also broken down by how the funding is managed (i.e. Agency, Plan or Self).

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 ? <small>(including stated supports)</small>	Spent Funds ?	Allocated Funds ?	Available Funds ?
Core Supports (Self-Managed)								
Stated Support: Incontinence Alarms					\$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
Stated Support: Text To Speech Device					\$5,000.00	\$1,310.00	\$3,690.00	\$0.00
Home Modifications					\$20,092.52	\$0.00	\$20,092.52	\$0.00
Stated Support: Elevator - Home					\$1,278.00	\$0.00	\$1,278.00	\$0.00
Stated Support: Lifts/Stair Climbers/Elevator					\$14,292.00	\$0.00	\$14,292.00	\$0.00
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	
Stated Support: Incontinence Alarms	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

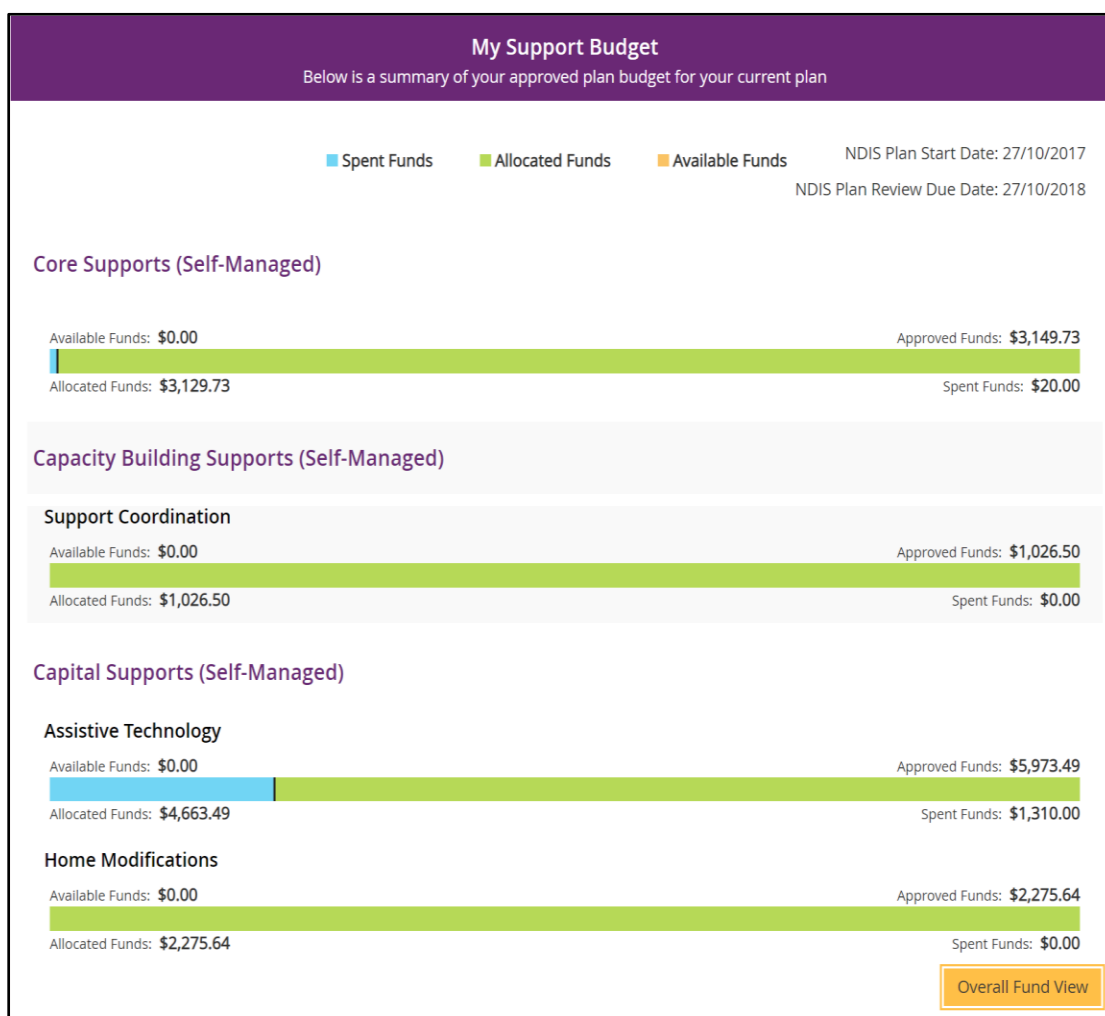
Support Category	Start Date ?	End Date ?	Allocated Funds ?	Spent Funds ?	Last Payment ? Date
Assistive Technology	17/05/2019	15/05/2022	\$1,829.80	\$0.00	
Stated Support: Text To Speech Device	17/05/2019	15/05/2022	\$3,690.00	\$1,310.00	21/05/2019
Home Modifications	17/05/2019	15/05/2022	\$4,522.52	\$0.00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

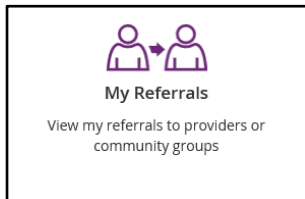
The screen changes to display a detailed view of:

- 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: *

All Referrals

▼

Search

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

Back

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.