NDIS myplace portal

Step-by-step Guide

Service Bookings

July 2022

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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 screenshots (pages 6, 7, 8, 9, 11, 15, 16, 17, 18, 19 and 20)

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.

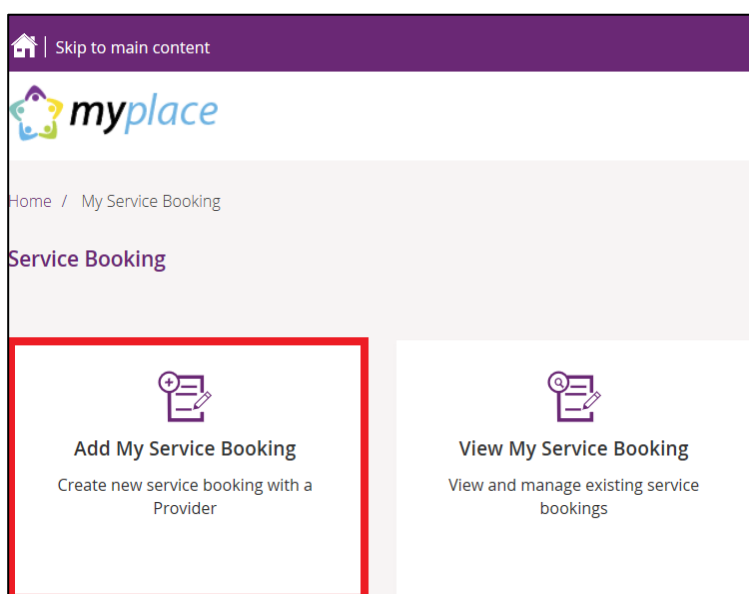**1.** Select the **My Service Booking** tile from the home page.
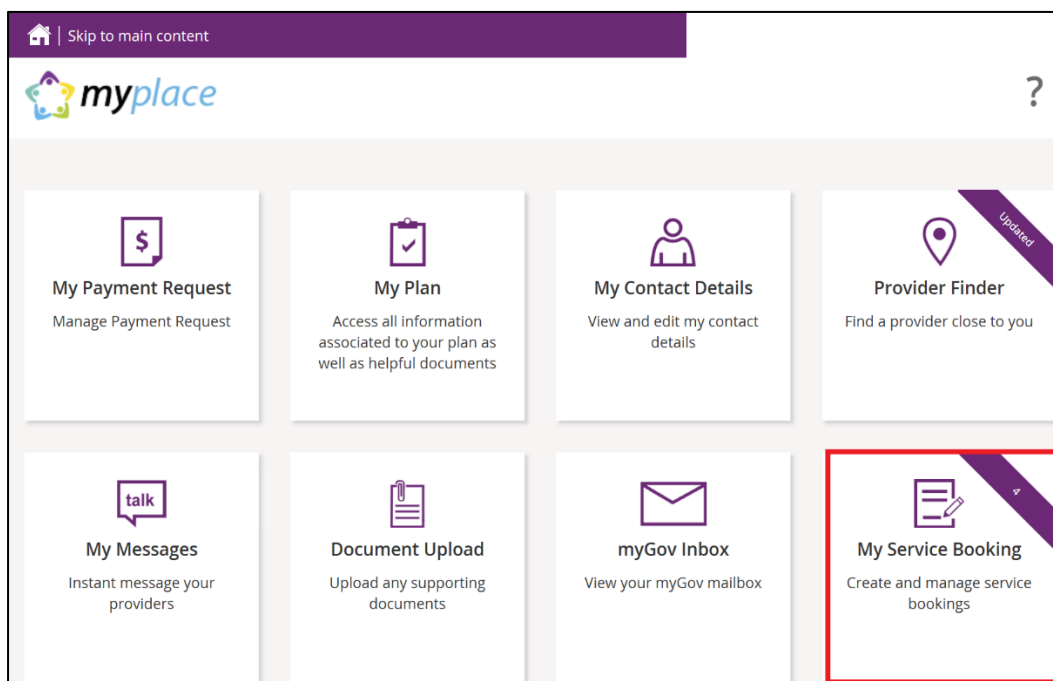
The Service Booking page displays. You have two tiles:
- Add My Service Booking
- View My Service Booking

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.

Home / My Service Booking / Add

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

Required fields are marked with an asterisk (*)

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

[Cancel] [Next]

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

Home / Provider Finder

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

I am looking for

[My recent providers] [A new provider or service]

Recently engaged providers

Print provider information

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

[Show Map]

Burgers and Friends
0433179412
135 reed street, greenway, ACT, 2600
Find Directions

Visit provider website
moudgilgay@gmail.com

[View Details]

Big Fun
0262000000
15 Tay Street, Watson, ACT, 2076
Find Directions

graham.barrs@actpeace.ngo.com.au

[View Details]

Hard 'Wheelbarrow
0400000033
38 PRINTERS WAY, KINGSTON, ACT, 2604
Find Directions

Visit provider website
graham.barrs@ndis.gov.au

[View Details]

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.

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

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

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.

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.

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.

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

The Review screen displays.

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.

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.
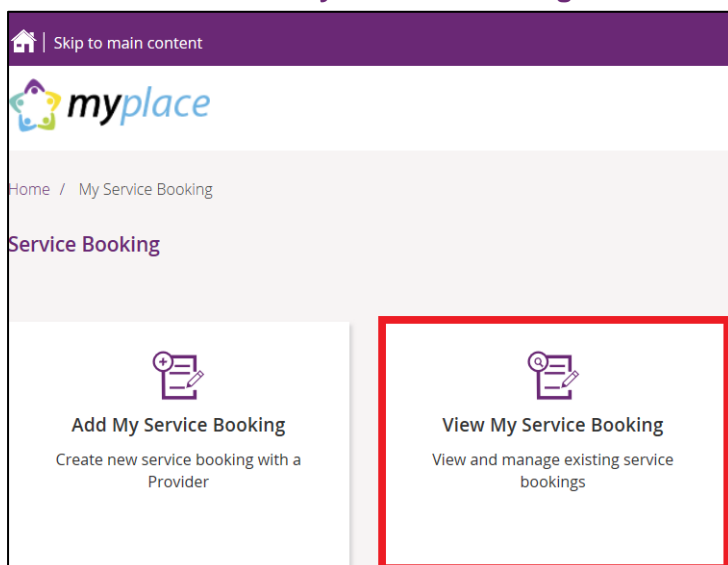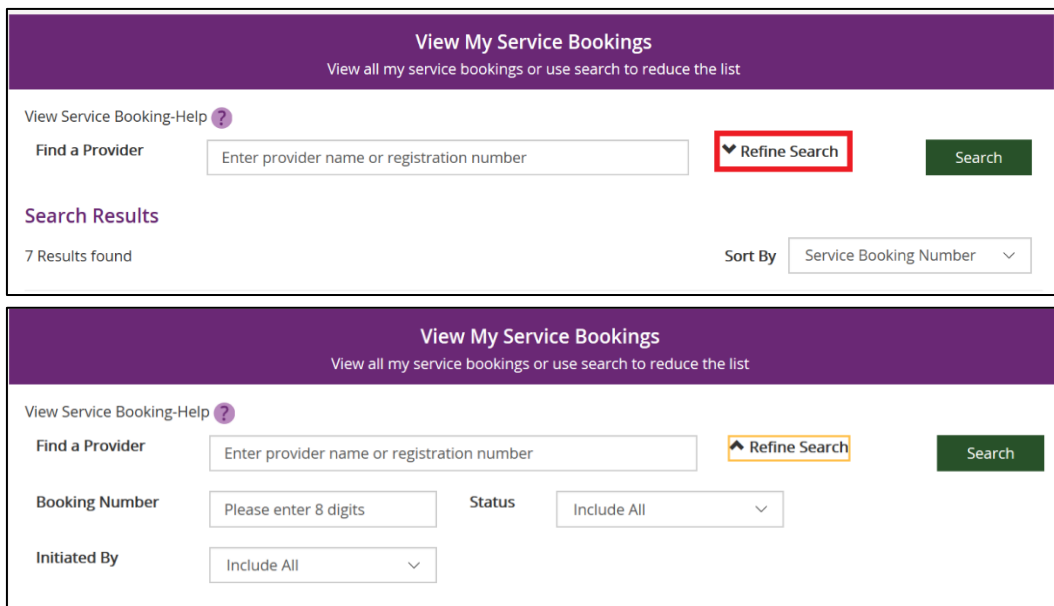
Your service bookings display.
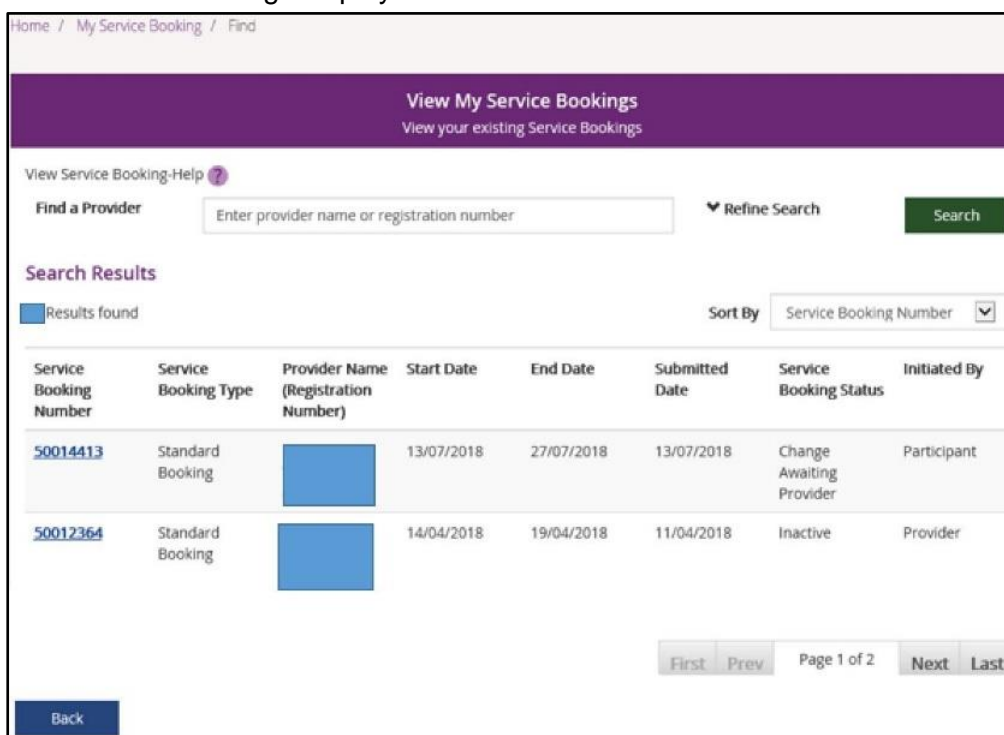
Refine Search

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

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

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

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.

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

7. 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

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

2. Click the **Service Booking Number** of the booking you wish to edit.

Home / My Service Booking / Find

View My Service Bookings
View your existing Service Bookings

Required fields are marked with an asterisk (*)

Search for Service Booking
Help on this ?

Search by: Please select ▾

Search Results

31 Results found   Sort By   Service Booking N ▾

Service Booking Number	Service Booking Type	Provider Name (Registration Number)	Start Date	End Date	Submitted Date	Service Booking Status	Created By
50014413	Standard Booking	Manishs Wheelchairs (4050000000)	13/07/2018	27/07/2018	13/07/2018	Active	Participant

3. 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 'Wheelbarro w (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
Manishs 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	1	$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.

5. 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**.

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.

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

4.

5. Click the **Submit** button in the bottom right hand corner of the window.

6. 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?
>
> NO   YES

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

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.