(Title on screen) How to create a service booking

Narrator: Welcome to the creating a service booking video tutorial.

This short video offers a practical step-by-step guide to creating a new service booking.

You can work through the tutorial at your own pace, pausing the video as we progress.

To get to this stage, you would have already established a service agreement with a participant.

One that sets out expectations of the supports to be delivered and how they will be delivered.

But before we begin, did you know, if a participant is agency managed, you will need to create a service booking before providing supports to a participant?

Without a service booking, you will not be able to submit payment requests to be paid for the supports you have provided to agency-managed participants.

If the participant is not agency managed, you should discuss how they will pay for the supports you are going to deliver.

There are three simple steps to creating a service booking.

Step one. Log into the MyPlace home page at [www.myplace.ndis.gov.au](http://www.myplace.ndis.gov.au).

Once logged in, select the 'service booking' tile on the MyPlace home page.

The Service Booking page displays two options, 'New Service Bookings' and 'View Service Bookings'.

Select the 'New Service Bookings' tile. Enter the participant's last name, NDIS number and date of birth.

Then select 'Search'.

The next step is to select the service booking type.

There are two types available - 'Standard Booking' for funds that are agency managed and 'Plan Managed' for funds that are managed by a plan manager, as specified in the participant's plan.

'Plan Managed' is only available when a provider is managing participant funding.

Note, if these options are not available, please refer back to the participant's plan for more information.

Enter the start and end dates of the service booking, noting that these dates cannot sit outside the date range of the plan.

Then select Find Plan.

Step two

Select the button of the plan you want to work with.

Note: if the participant's support relates to an 'in-kind program', please contact the NDIA for more information, otherwise continue.

Step three

You've reached the third stage of creating a service booking, you're almost there.

Under the 'Support Details' heading, select the support category using the dropdown button for 'Support Budget'.

There are two types available - 'category level', this is referred to as Support Budget in the Support Details section.

And 'line item level', this is referred to as the Item Number on screen.

In most cases, service bookings will be created on the category level.

Note: occasionally a participant's plan may include a specific line item for a type of support.

In this case, the service booking must be created at the line item level.

If you are creating a support budget on the line item level, please refer to the 'NDIS MyPlace provider portal Step-by-Step Guide, part four - administering your services', on the NDIS website at [www.ndis.gov.au/provider-portal-guides](http://www.ndis.gov.au/provider-portal-guides).

Select the Support Budget category and enter the allocated amount.

You will notice that the support budget has been moved to the 'Added Details section'.

If the details are incorrect, you can edit or remove the entry using the action links.

If the details are correct, select 'Next' to continue.

Once you have selected 'Next' to continue, the support booking and item details display.

Note: if you receive an error message, you must rectify the error as instructed before you can successfully create the service booking.

Check that all details of the service booking are correct.

If details of the service booking are incorrect, you can select 'Back' to edit.

When you're confident the details are correct, you may wish to add explanatory notes to the 'Comments' field.

Then tick the mandatory declaration and select 'Submit'.

A green box will appear confirming your service booking has been successfully submitted.

You're all done.

To view your service bookings, select 'View Service Bookings' or select the MyPlace logo to return to the home page.

We hope that this video tutorial has been useful.

If you require further assistance, please refer to the 'NDIS MyPlace provider portal Step-by-Step Guide', found on the NDIS website at [www.ndis.gov.au/provider-portal-guides](http://www.ndis.gov.au/provider-portal-guides).

Refer to other service booking videos and resources at [www.ndis.gov.au/service-bookings](http://www.ndis.gov.au/service-bookings).

Call the National Contact Centre on 1800 800 110.

Or email the Provider Support team at provider.support@ndis.gov.au.