

NDIS myplace provider portal

Step-by-step guide

Part 2. Maintaining your
information

October 2023



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Changes from the last version

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

As of October 2023:

- Updated text and screenshots in Link to my Organisation chapter (pages 14 and 15)

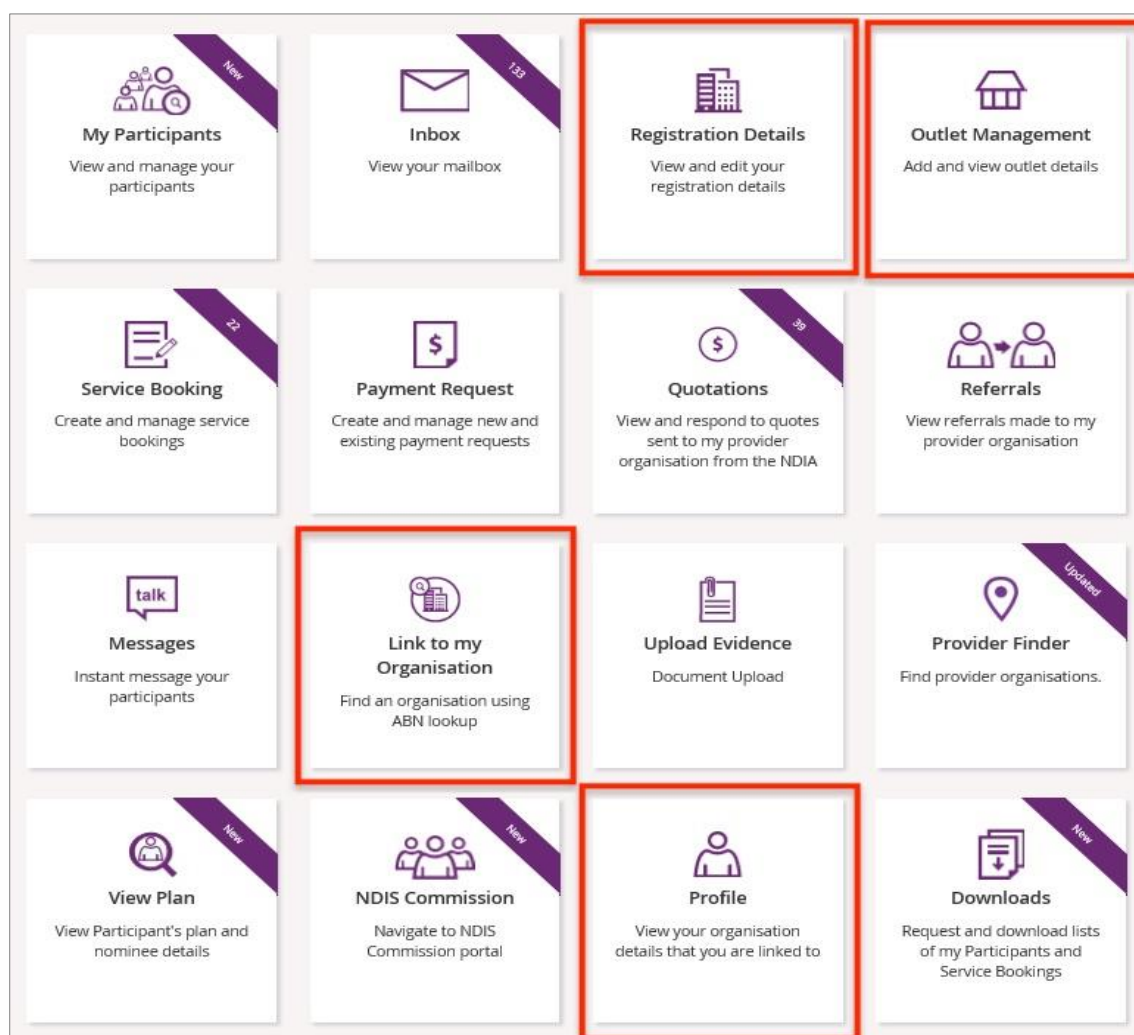
How to contact NDIS

Contact the NDIS by		
 <p>NDIS Webchat</p> <p>You can live chat with us about:</p> <ul style="list-style-type: none"> • myplace provider portal • Service bookings • Payment requests • Quotes • Referrals • Request for service • Searching for a register provider 	 <p>Phone</p> <p>1800 800 110 You can call us about:</p> <ul style="list-style-type: none"> • myplace provider portal • Service bookings • Payment requests • Quotes • Referrals • Request for service • Searching for a register provider • Submitting a general enquiry, feedback, compliment or a complaint 	 <p>provider portal</p> <p>You can use the provider portal to:</p> <ul style="list-style-type: none"> • Submit a payment enquiry • Submit a general enquiry, feedback, compliment or a complaint • Search for a provider • Upload documents
 <p>Email us enquiries@ndis.gov.au</p> <p>You can email us about:</p> <ul style="list-style-type: none"> • Submitting a general enquiry, feedback, compliment or a complaint • Emailing a document, form report or letter 	 <p>Contact and Feedback form NDIS Online Form</p> <p>You can use the Online form to:</p> <ul style="list-style-type: none"> • Submit a general enquiry, feedback, compliment or a complaint • Request a call back 	 <p>Mailing address</p> <p>National Disability Insurance Agency GPO Box 700 Canberra ACT 2601</p> <p>You can mail us:</p> <ul style="list-style-type: none"> • Compliment, complaint or provide feedback, • Document, form, report or letter

Maintaining your information

These functions enable you to:

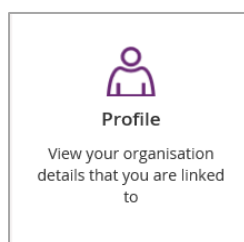
- View your **Profile** (your and your organisation's contact information and roles within the provider portal).
- View your **Registration details** (the services you are approved to provide under the NDIS). To register and maintain your registration details and registration groups you will need to contact the NDIS Quality and Safeguards Commission.
- View your **Outlets** (the times and places from which you deliver services). To add or edit outlet information for outlet you will need to contact the NDIS Quality and Safeguards Commission.
- Manage the organisations which **Link to my Organisation** (the organisations you work for).



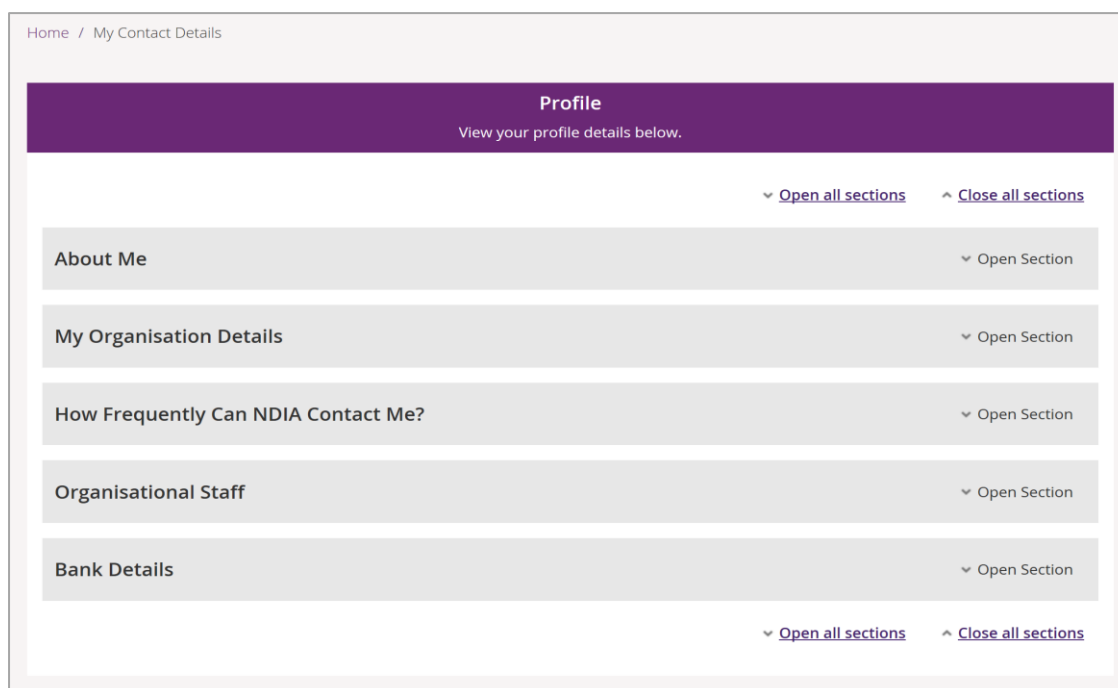
Profile

This allows you to view and update your personal details, and view (and update if you are the account manager for your organisation) the Provider Finder Display in your organisation details, organisation staff and bank details.

1. Select the **Profile** tile on the **myplace** home page, or the **Person** icon from other pages.

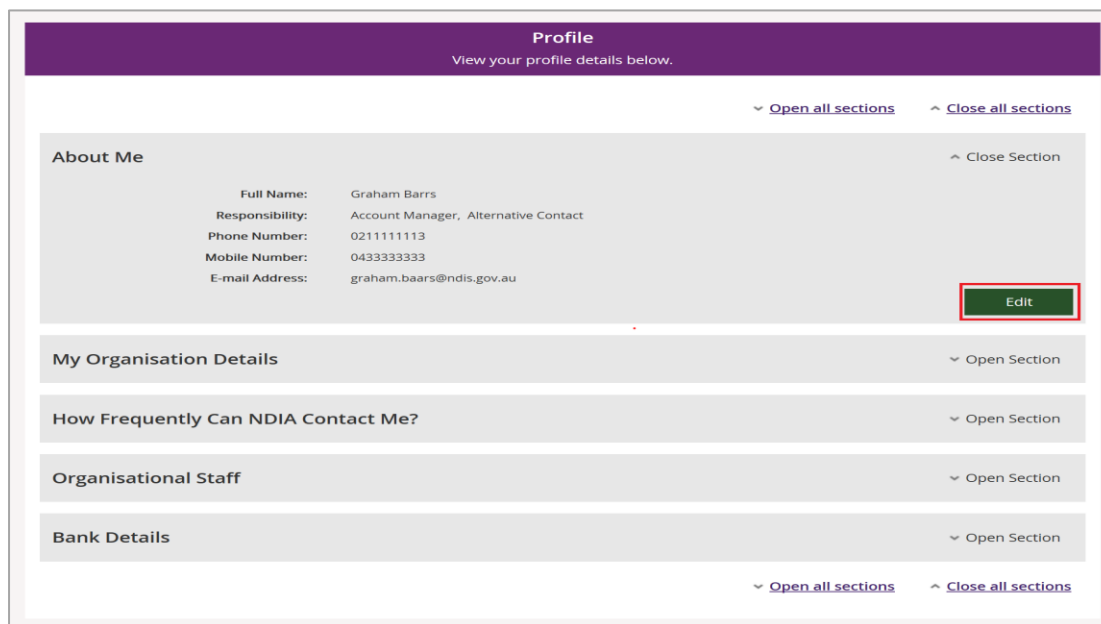


2. The **Profile** page displays. Use the **Open** and **Close** section buttons to see all the information.

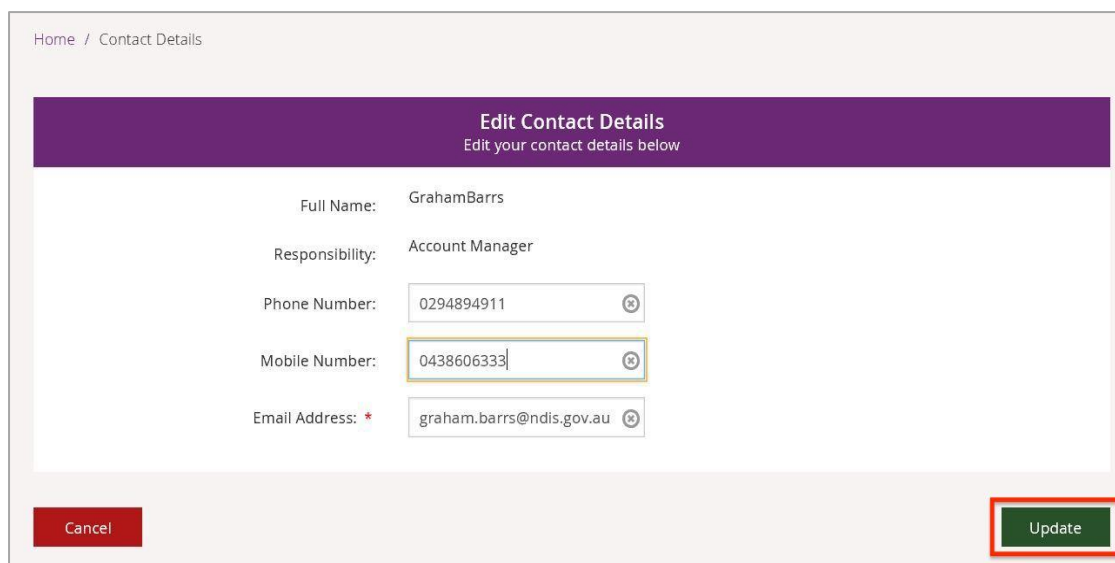


About me

1. Select **Edit** in the **About Me** group to update your telephone numbers and email address.



2. Enter your changed details and select **Update**.



Note: If you do not wish to update your details, select **cancel**. You can only change phone numbers and the email address.

My organisation details

1. View name and contact information for your organisation in the **My Organisation Details** section.
2. Select **Edit** to update whether the provider should display in the Provider Finder, and if so whether the address should also be displayed.

Profile

View your profile details below.

[Open all sections](#) [Close all sections](#)

About Me [Open Section](#)

My Organisation Details [Close Section](#)

Trading Name:	Big Fun
Legal Name:	TISDELL, STEPHEN JOHN
Organisation ID:	4050004196
Address:	15 Tay Street Watson, ACT, 2076
Phone Number:	0262000000
Email Address:	graham.barrs@actpeace.ngo.com.au
Website:	
Provider Finder Display:	Yes
Do you wish to hide your address details in the provider finder?:	No

[Edit](#)

Note: The following steps are only available if you are the account manager for your organisation.

3. Select **'Yes'** if the provider should display in the Provider Finder, and if so whether the address should also be displayed. Then select **Update**.

Edit My Organisation Details

Choose if you would prefer to display details of the organisation on the provider finder

Trading Name:	Big Fun
Legal Name:	TISDELL, STEPHEN JOHN
Organisation ID:	4050004196
Address:	15 Tay Street Watson, ACT, 2076
Telephone Number:	0262000000
Email:	graham.barrs@actpeace.ngo.com.au
Website:	
Provider Finder Display:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Do you wish to hide your address details in the provider finder?:	<input type="radio"/> Yes <input checked="" type="radio"/> No

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

Note: To edit your organisation's details including your email address, to make sure you receive important information, you will need to contact the NDIS Quality and Safeguards Commission.

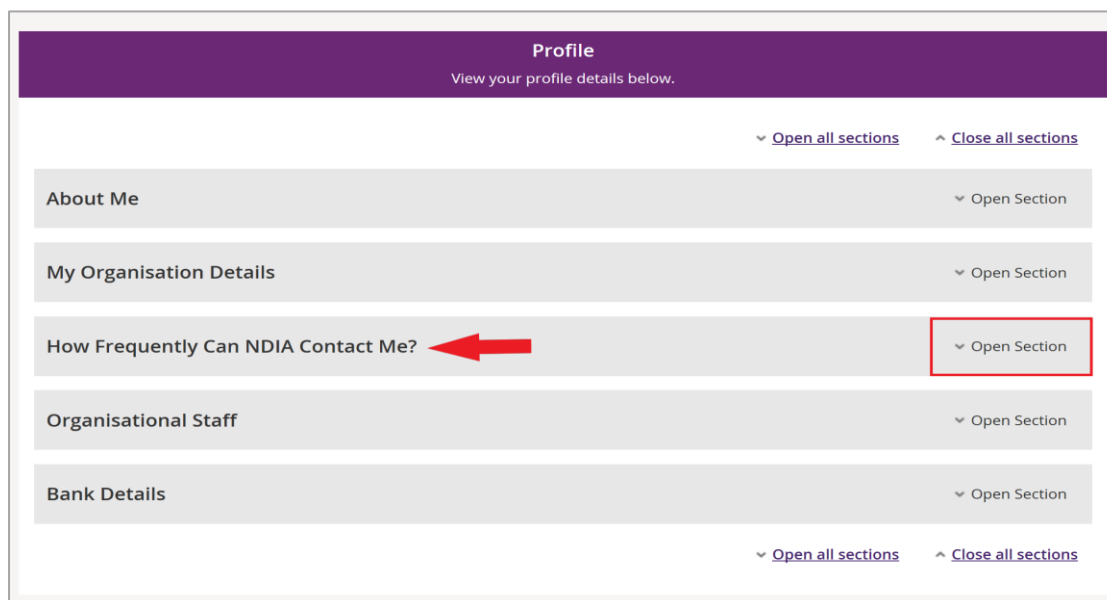
How Frequently Can NDIA Contact Me?

Nominate how often your organisation wants to be notified about changes to service bookings and quotations, and new Requests for Service sent to your organization for review. For new Requests for Service you will be notified immediately. For service bookings and quotations you can choose to be notified:

- Immediately
- Daily
- Weekly
- Never

Note: You will only be notified about service bookings and quotations that your organisation needs to action.

1. Select **Open Section** to view or edit your information.



2. Select **Edit** to update your preferred frequency.

3. Choose from the drop-down how often you wish to receive service bookings and quotations notifications and select **Update**:

- Immediately
- Daily
- Weekly
- Never

Note: If you choose daily or weekly, all changes for the previous day or week (Monday to Sunday) will be grouped together and sent in one message to your inbox.

4. Choose from Yes and No to update your Request for Service email preferences.
5. Select **cancel** if you wish to cancel the selection. A popup box will appear asking for confirmation to return to the Profile screen without updating any contact details.
6. Select **yes** to return to the **Profile** screen; select **No** to return to the list of correspondence options and make a selection.

Organisational staff

Your role (also shown as Responsibility or Contact type depending on the screen) will be allocated to you by your organisation's account manager.

If you are linked to multiple organisations, your role may vary between organisations.

Depending on your role, you can view your profile, edit your details, edit contacts and update bank account details. The roles available are:

Contact type / Responsibility role	Account manager	Primary contact	Alternative contact
Number allowed (per Organisation)	Multiple	One	Unlimited
Create Service bookings	Yes	Yes	Yes
Submit Payment requests	Yes	Yes	Yes
Cancel Paid and Pending Payment requests	Yes	Yes	No
Add/ Remove contacts	Yes	No	No
Update Bank account	Yes	No	No

If you have the account manager role, you can edit the staff roles for your organisation through the **Organisational Staff** section.

Important note: The first person who links to an organisation will be automatically assigned the roles primary contact and account manager. This applies when the registration is processed through the NDIS Quality and Safeguards Commission.

1. Select **End Role** in the Action column to remove that access type from a contact.
2. To add a new role to an existing contact, select **Add Role**.

Organisational Staff ^ Close Section					
Name	Contact Type	Start Date	End Date	Status	Action
Bane Barrs	Alternative Contact	26/09/2018	31/12/9999	Approved	End Role → Add Role ←
	Alternative Contact	18/09/2018	25/09/2018	Ended	Add Role
	Alternative Contact	14/09/2018	17/09/2018	Ended	Add Role
	Alternative Contact	22/07/2018	13/09/2018	Ended	Add Role
dalit sharma	Primary Contact	23/08/2018	31/12/9999	Approved	Add Role
	Account Manager	15/02/2018	31/12/9999	Approved	End Role Add Role
	Primary Contact	06/06/2018	22/08/2018	Ended	Add Role
	Alternative Contact	14/02/2018	05/06/2018	Ended	Add Role
	Alternative Contact	14/10/2016	15/10/2016	Ended	Add Role

3. Select the contact type from the **Contact Type** drop-down and select **Update** to save the record.

Home / Add role

Add Role
Add contact roles for your organisational staff

Full Name: Louise Davies

Contact Type: * Please select
Primary
Account Manager

Cancel
Update

Tip: The **Contact Type** available to select will be limited to the roles the staff member does not hold.

Tip: An individual user cannot hold both primary contact and alternate contact roles at the same time.

Bank details

The NDIA will pay **Payment Requests** from your organisation to this account.

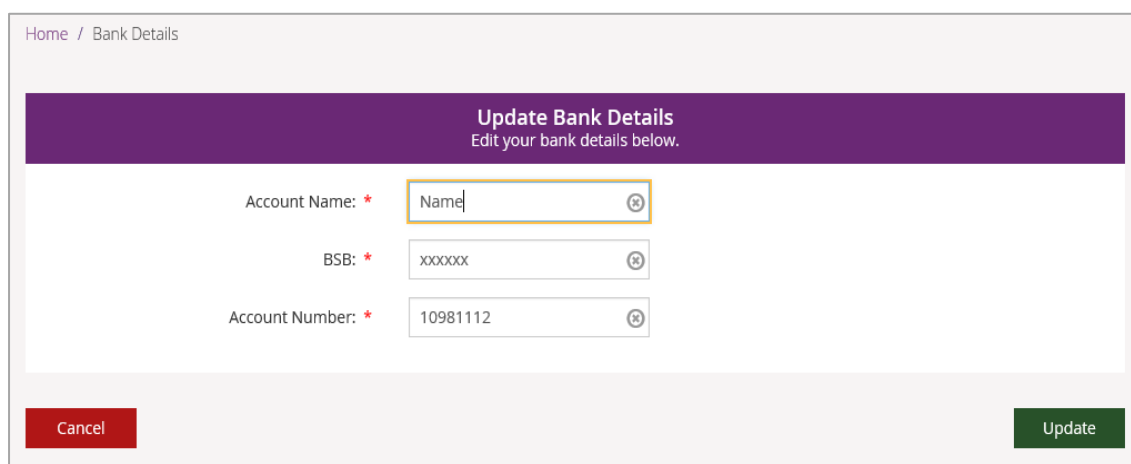
1. To add bank account details, select **Add Bank Detail** from the **Bank Details** section.

Note: Only the account manager can add or edit bank accounts details.

Note: Bank details cannot be updated if there are payments approved but not yet paid. Changed bank details will take effect immediately.

2. Complete the following fields:

- At **Account Name**, enter the bank account name.
- At **BSB**, enter the six-digit BSB number.
- At **Account Number**, enter the account number.
- Select **Update**.



Home / Bank Details

Update Bank Details

Edit your bank details below.

Account Name: *

BSB: *

Account Number: *

3. Once you have saved your bank account details, use the **Edit** button if you need to change the account details.

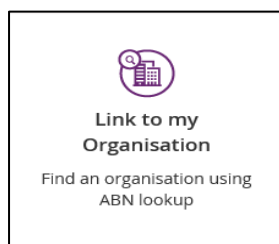
Note: Whenever the bank account details are added or edited, the primary contact for your organisation will receive an SMS stating:

We have updated your bank account details as requested. Contact NDIA on 1800 800 110 if you need to.

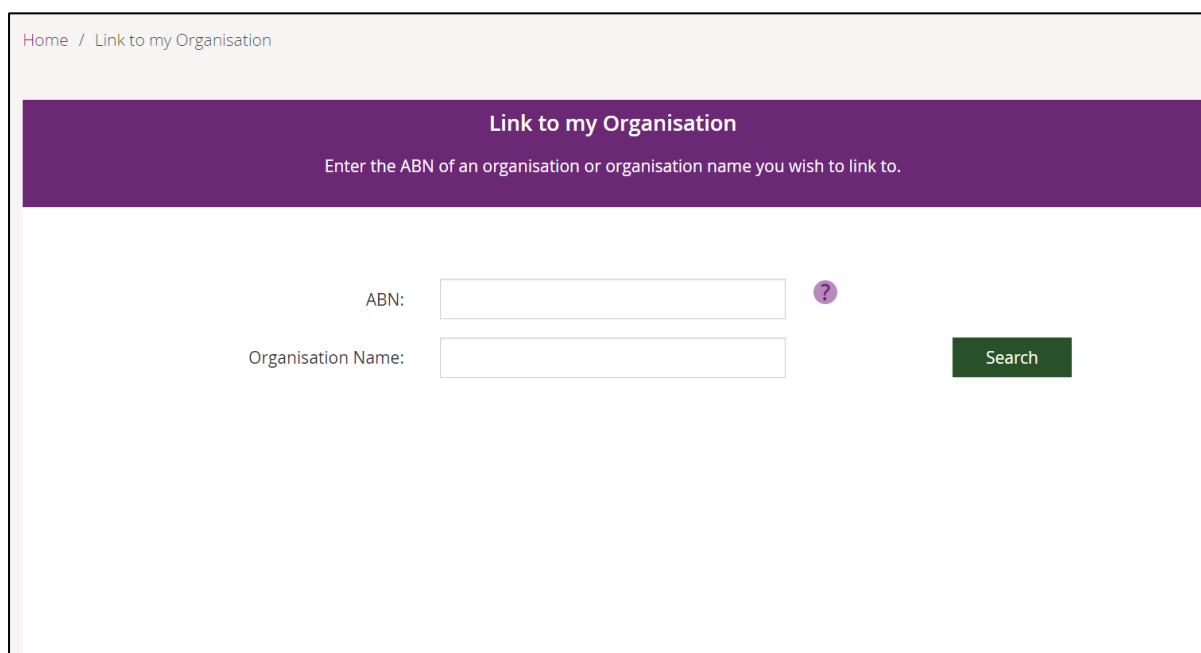
Link to my organisation

This allows you to link your **PRODA** account to another provider. It works the same way as when you linked the current provider you are using in **myplace**.

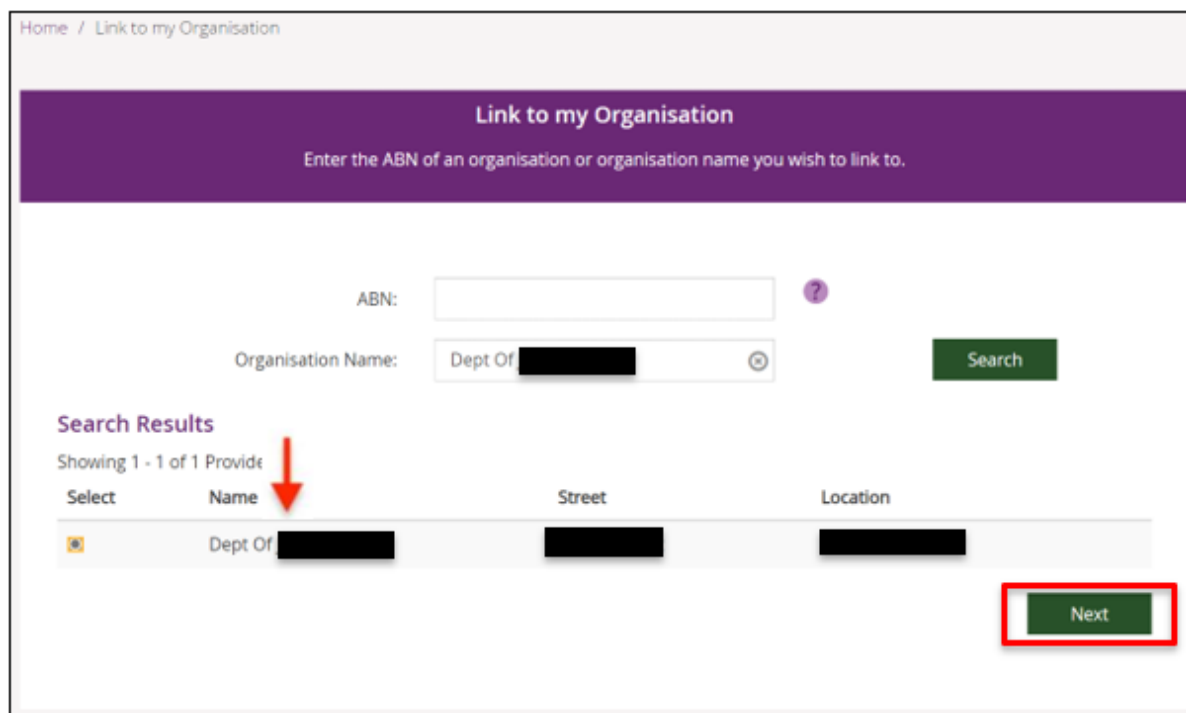
1. Select the **Link to my Organisation** tile on the **myplace** home page.



2. Enter the ABN (11 digits, no spaces) or the Organisation Name of the provider to which you wish to link and select **Search**.



3. Select the provider from the list and select **next**.



Home / Link to my Organisation

Link to my Organisation

Enter the ABN of an organisation or organisation name you wish to link to.

ABN:

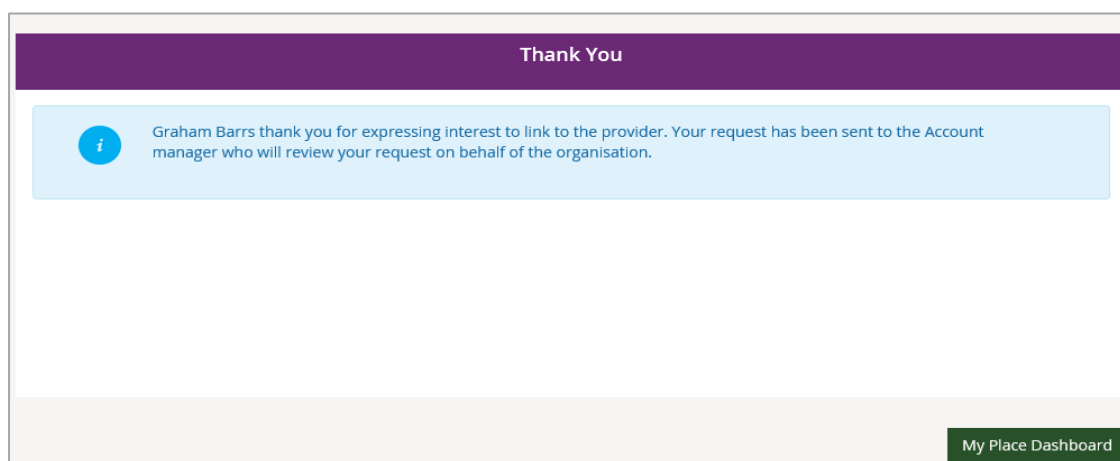
Organisation Name:

Search Results


Showing 1 - 1 of 1 Provide

Select	Name	Street	Location
<input type="checkbox"/>	Dept Of [redacted]	[redacted]	[redacted]

4. A thank you message displays. Your request is sent through to the provider.



Thank You

 Graham Barrs thank you for expressing interest to link to the provider. Your request has been sent to the Account manager who will review your request on behalf of the organisation.

Important note: If you are linking to a provider that does not have a primary contact set up, a new screen will pop up that asks you to provide one.