Provider Portal Tips

February 2017

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3.1 Service Bookings…….. 21

1. Purpose

The purpose of this document is to assist NDIA staff (e.g. BSOs) in providing suggested solutions to common errors in the Provider Portal.

2. Errors and Solutions

2.1 Provider human error: Service booking created with incorrect start date

Background

A Provider has incorrectly entered start and end date as same date. This has resulted in them not being able to claim.

I was just wondering if you could help me with this error, I have just tried to claim this client but the start date is the same as the finish date. Is it possible to change the start date to 20/09/2016? I can't see anyway of editing the date.

View Service Booking Details

Service Booking Details

Participant Name(NDIS Number)	Type	Number	Start Date	End Date	Total	In-Kind Program	Status	Review
	Standard Booking	50428978	20/09/2017	20/09/2017	$0.00	-	Active	-

Support Details

No.	Support Budget	Support Item Number	Support Item Name	Quantity	Allocated Amount	Remaining Amount
1	Transport	-	-	1	$1,606.00	$1,606.00

Back | End Service Booking

Thanks

Suggested solution

CRM does not allow the start date of a service booking to be edited, (as at 20/10/16). A workaround to this issue is to edit service booking, changing the amount to zero.
Then inform the Provider to create a new service booking with the correct start date. The end date will have to be changed by 1 day for the system to allow it. Change to 19/09/2017 in order for the system to accept it.

2.2 Bulk upload error:

"Quantity entered is more than the approved quantity in the service booking.;Request 000010643440 rejected, C04,Quantity entered is more than the approved quantity in the service booking.;Payment Request 000010643440 saved successfully.;Request 00001064344"

When you download the bulk upload status report. You can filter by 'error'. In relation to this error:

Participant Details

Participant Name:
NDIS Number:

Claim Details

#	Start date of support	End date of support	Support Budget	Support Item Number	Item Quantity	Unit of Measure	Payment Amount	GST	Invoice Number
1	26/09/2016	02/10/2016	Transport	02_051_0108_1_1	338.14	Years	$169.07	GST Free	30949

Claim Amount Summary

#	Support Category	Total Claim Amount
1	Transport	$169.07
	Grand Total	$169.07

View Service Booking Details

Service Booking Details

Participant Name(NDIS Number)	Type	Number	Start Date	End Date	Total	In-Kind Program	Status	Review
	Standard Booking	50393963	30/08/2016	30/08/2017	$0.00	-	Active	-

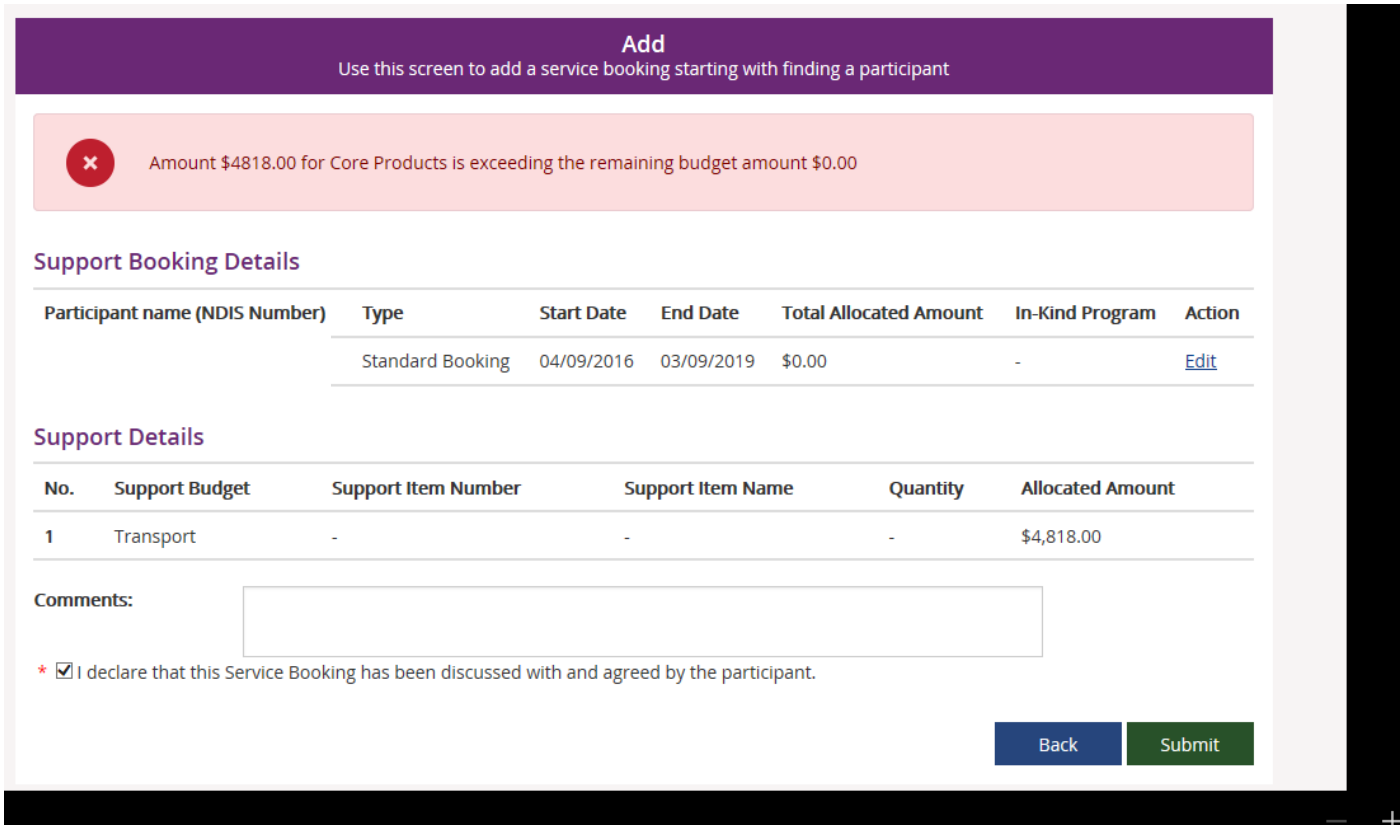
Support Details

No.	Support Budget	Support Item Number	Support Item Name	Quantity	Allocated Amount	Remaining Amount
1	Transport	02_051_0108_1_1	transport	1	$3,456.00	$3,456.00

<u>Suggested solution</u>

In this example, the error is because the quantity has been submitted as “1”. However the provider claim is for a quantity higher than “1”. This resulted in the error message above. To resolve, edit the service booking. The provider will need to adjust the quantity in the service booking (e.g. If the support item has a unit price of $1). The above service booking is: Quantity 1, total price $3,456. This will result in an error when claiming. Change to quantity of $3,456, total price $3,456. The Provider will now be successful in payment requests.

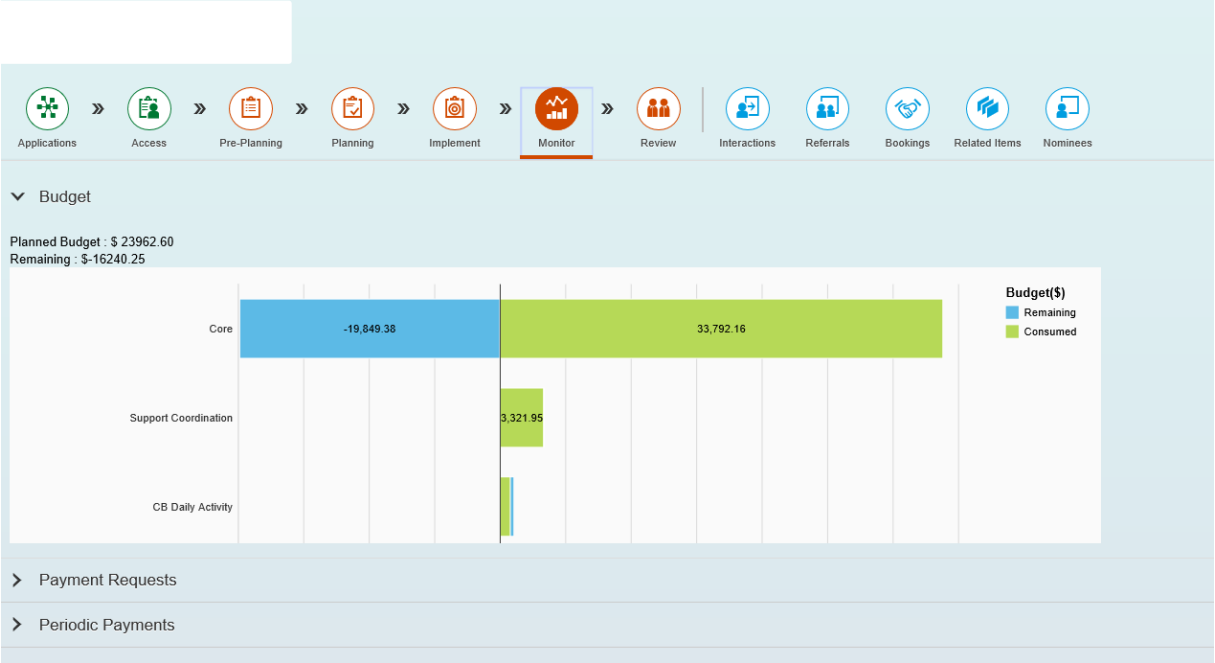
2.3 Service booking error: “Amount “x” for Core Products is exceeding the remaining budget amount $0.00”

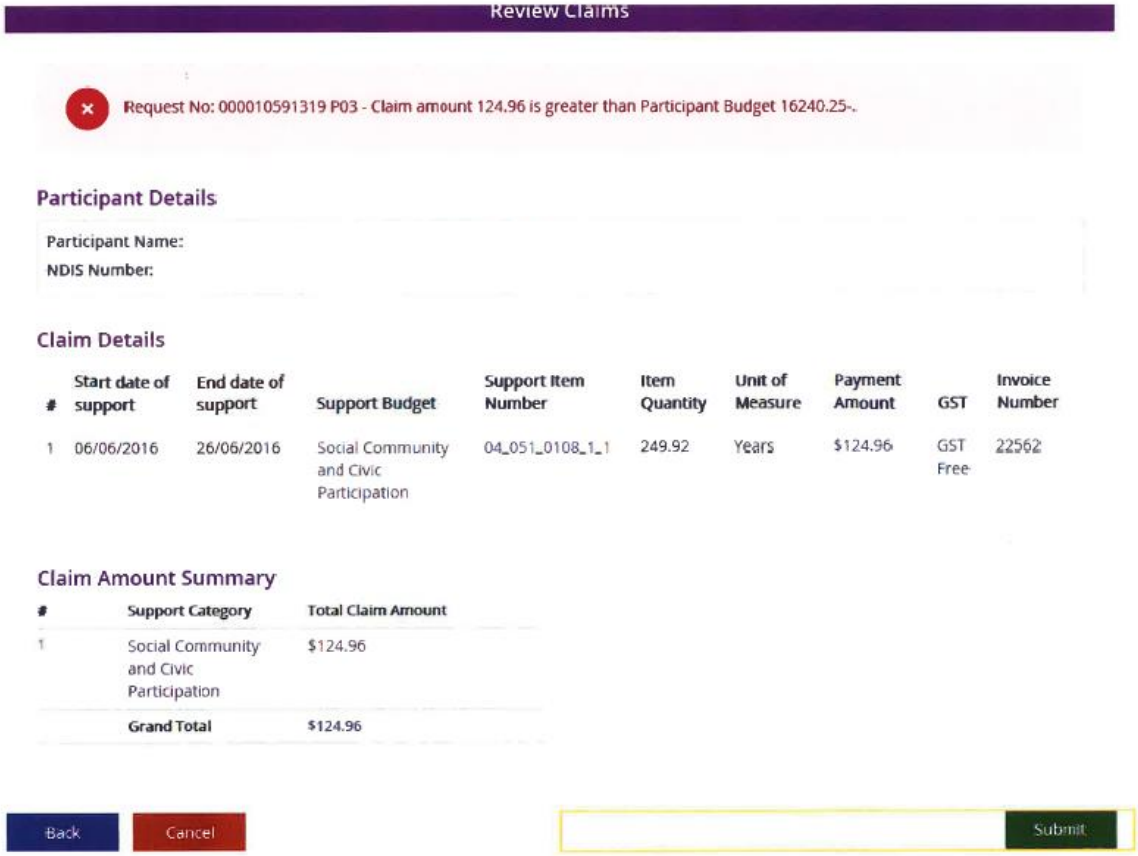


Suggested solution

This error message isn’t necessarily a straight forward answer. It may require some local troubleshooting. NDIA staff to find the participant in CRM, look at the plan in question and the other service bookings in place. NDIA staff may need to click on the other service bookings to see which support items they cover. NDIA staff may need to manually add up the value of other service bookings. In this example, an alternative Provider had a service booking in place for Transport. The provider should contact the support coordinator or family to ensure the correct booking has been made.

2.4 Negative remaining amount in CRM



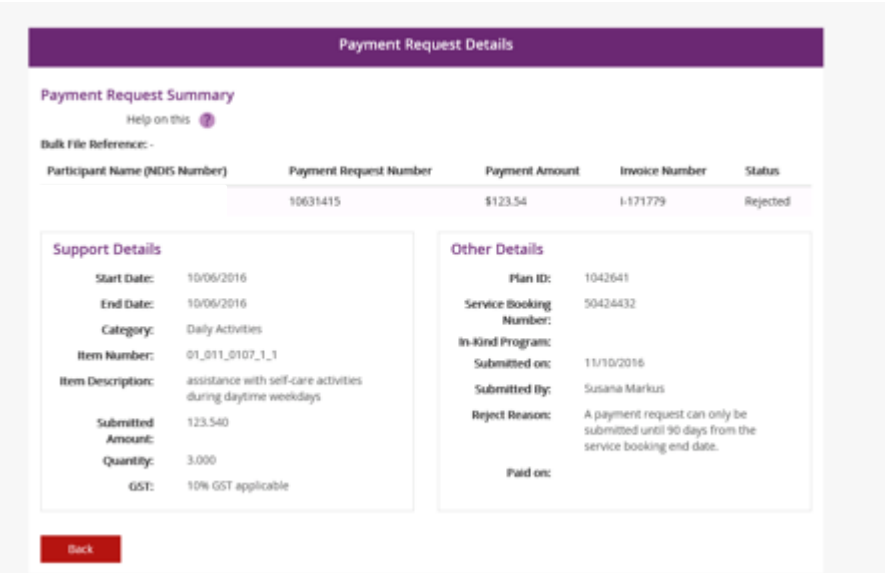


Suggested solution

This appears to be an issue with new plans, where in kind balances were drawing down on normal budgets. An IT fix has been implemented which should resolve this issue. If persists, NDIA staff to escalate through MyIT issue.

2.5 Error message: Claim is greater than 90 days. “a payment request can only be submitted up until 90 days from the service booking end date.

Please note the below error message has occurred as the provider has claimed using the manual claim form.



Payment Request Details

Payment Request Summary

Help on this

Bulk File Reference: -

Participant Name (NDIS Number)	Payment Request Number	Payment Amount	Invoice Number	Status
	10631415	$123.54	I-171779	Rejected

Support Details

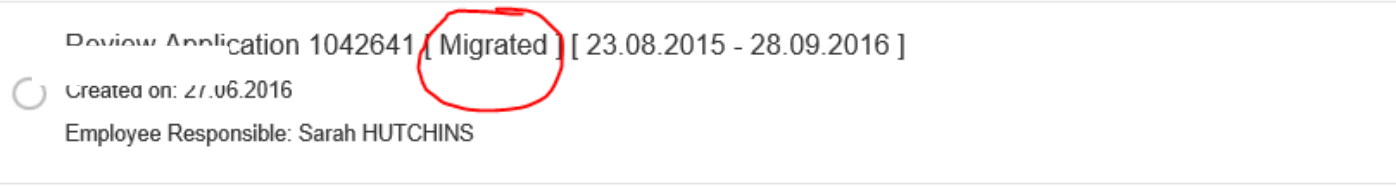
Start Date:	10/06/2016
End Date:	10/06/2016
Category:	Daily Activities
Item Number:	01_011_0107_1_1
Item Description:	assistance with self-care activities during daytime weekdays
Submitted Amount:	123.540
Quantity:	3.000
GST:	10% GST applicable

Other Details

Plan ID:	1042641
Service Booking Number:	50424432
In-Kind Program:	
Submitted on:	11/10/2016
Submitted By:	Susana Markus
Reject Reason:	A payment request can only be submitted until 90 days from the service booking end date.
Paid on:	

Back

Pathway:



Review Application 1042641 [Migrated] [23.08.2015 - 28.09.2016]

Created on: 27.06.2016

Employee Responsible: Sarah HUTCHINS

If the plan is a migrated plan, the rules around claiming have been relaxed. The provider will be able to process a claim, greater than 90 days using the bulk upload process (providing the participant has sufficient funds).

2.6 Bulk upload error. “no plan found”

No plan found for participant &1 within the start and end dates &2 - &3.;S Num:0311, Item:0001, Service booking not found for the claim .;Support category is a mandatory field.

Example

Support dates submitted in payment request:

26/09/2016 02/10/2016

Participants plan dates:

New plan: 28.09.2016 - 28.09.2018

Old plan: 01.10.2015 - 27.09.2016

Suggested solution

In the example above the support dates straddle two plans. By troubleshooting in CRM, there is no service booking in place for the new plan. Request the provider creates a new service booking for the new plan, and then they will need to ensure they split out their claim for each plan.

2.7 Service booking error: “No approved service booking exist for the selected product within the selected start/end dates;Support category is a mandatory”

Suggested solution

NDIA staff to click on pathways, select the relevant plan, check the support dates in the claim, and check the service booking.

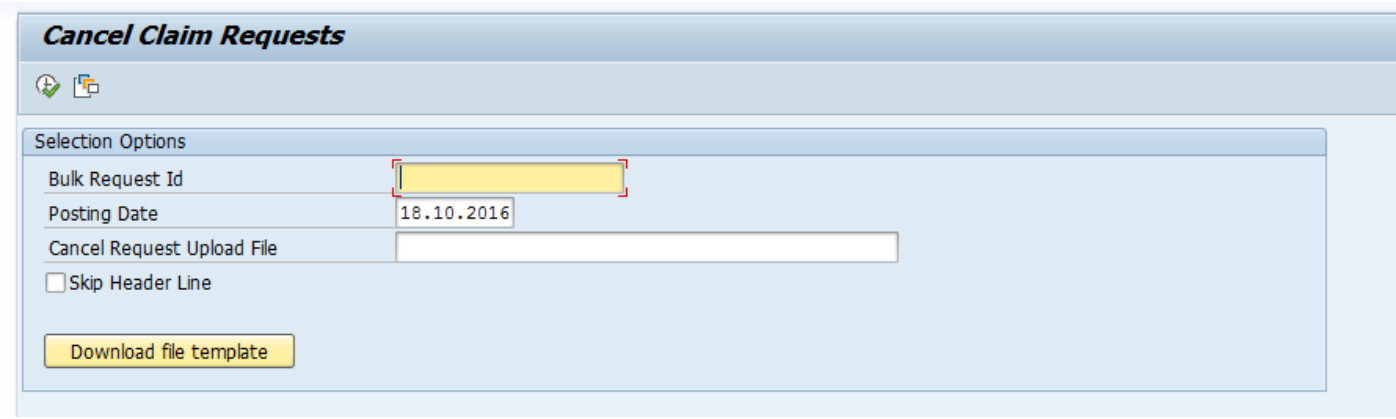
2.8 Provider request to cancel bulk upload

If deemed reasonable, NDIA staff to go into CRM and cancel them manually. If 50+ claims, NDIA staff may need to cancel in PSCD.

Example

Hi,
Today we accidentally sent through a bulk claims upload file with the wrong start and end dates.
Would it be possible for you to cancel the whole thing so we can resubmit it?

Through PSCD
Report: ZP_DA_R_CANCEL_CLAIM_REQUEST



When a payment request is cancelled, the original remain and a new negative payment request is created.

If payment clears, then it has been paid. An outstanding credit will be created which will be netted off when the correct file is uploaded.

2.9 Plan gap

Example

Old plan: 01.10.2015 - **30.**09.2016
New plan **11**.10.2016 - 11.10.2017

In the above example an 11 day plan gap noted.

NB: Please seek support from Regional Manager.

Potential resolution:

- If participant have sufficient funds, advise provider to claim from old plan
- If planner was aware of plan gap, and has added additional funds to new plan, advise provider to claim from new plan.

2.10 Cancelling service booking

<u>Suggested solution</u>

Provider may have entered incorrect information. When service booking is cancelled, it remains on CRM and isn't deleted. When you cancel, need to enter end date 14 days from the current date. The provider should then be able to make new service booking.

Please note you will be asked to enter an accrual amount. This is where Provider A may have a current service booking, then they decide to end their services. They may have provided 10% of services already. Therefore the accrual should be for 10%, in order for them to claim. Then service provider B can submit a service booking for the remaining 90% of the service booking amount.

2.11 Request to cancel a payment request/claim

With the transition from Siebel, a number of instances have been noted where duplicate payments were made in error. In addition, through day to day business and human error, providers request payments to be cancelled due to submitted incorrect information.

Providers are unable to cancel the claims themselves. In order to cancel on their behalf we require the following information.

Provider name
Provider NDIS number
Payment request ID
Participant name
Participant Number
Support item dates
Support item
Amount

The key bit of data to ensure the correct amount is cancelled is the ‘payment request ID’.

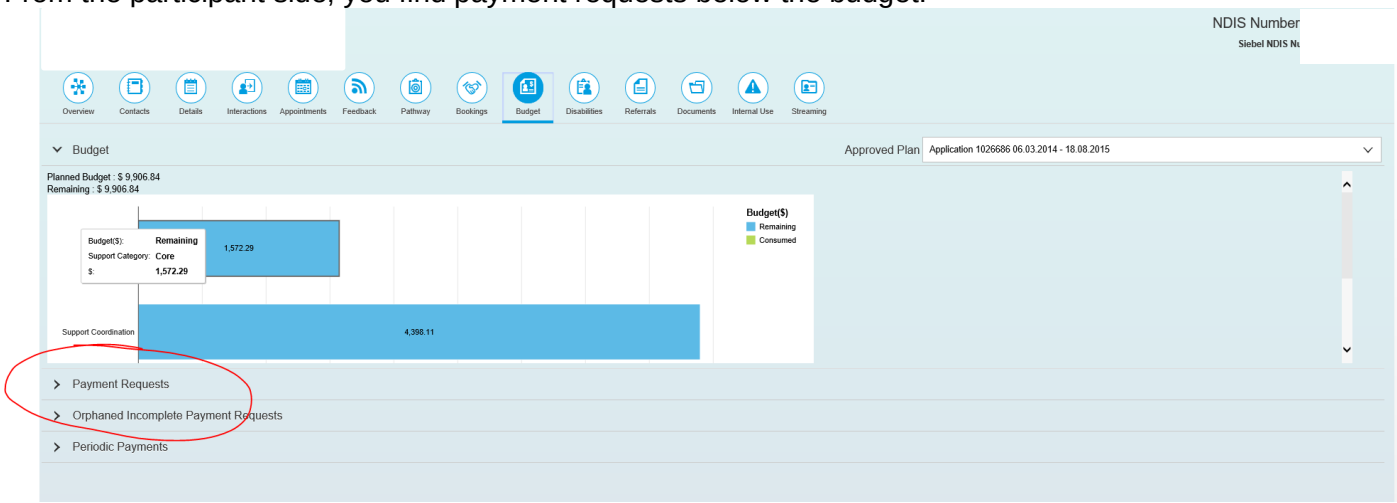
If needed to cancel 10 payments to one participant, rather than finding the provider then, trying to find the payment id (there could be thousands, if high number of participants. Search from the participant side, then look at payment requests, and find the relevant item. Then click on the payment ID, and cancel.

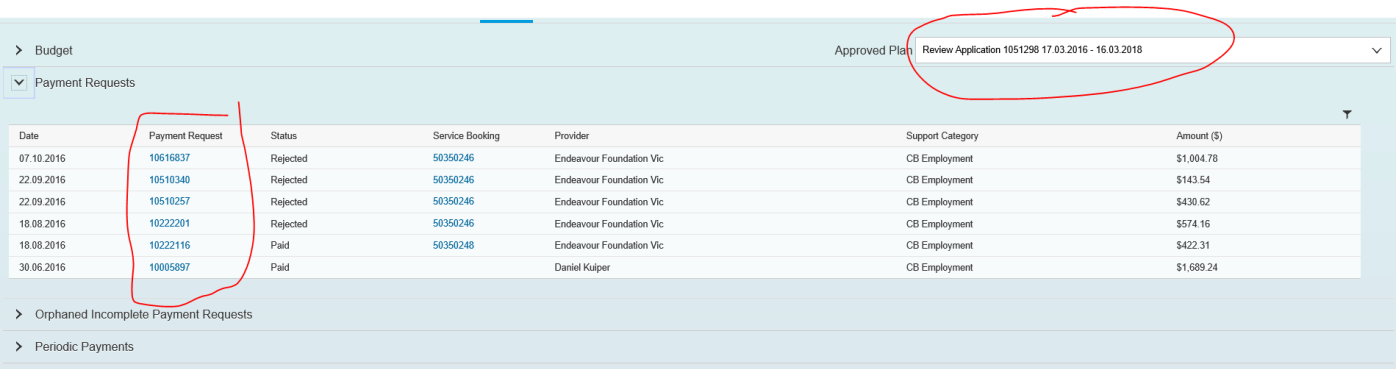
Please note that when you cancel a payment request, the funds will be returned to the participants’ plan. Please note that the provider will not have the money deducted from their bank account, but a credit will go against your account which will net down against future claims.

Ideal information provided:

RegistrationNumber	NDISNumber	SupportsDeliveredFrom	SupportsDeliveredTo	SupportNumber	ClaimReference	Quantity	UnitPrice	GSTCode	PaidTotalAmount	Payment Request Number	Participant Name	Capped Price	Payment Request Status	Error Message
		19/09/2016	19/09/2016	01_045_0115_1_1	7114977135	7	480.11	P2	3360.77	10567569	Tristan Buller	No	SUCCESSFUL	
		20/09/2016	20/09/2016	01_045_0115_1_1	7114977136	7	480.11	P2	3360.77	10567570	Tristan Buller	No	SUCCESSFUL	
		21/09/2016	21/09/2016	01_045_0115_1_1	7114977137	7	480.11	P2	3360.77	10567571	Tristan Buller	No	SUCCESSFUL	
		22/09/2016	22/09/2016	01_045_0115_1_1	7114977138	7	480.11	P2	3360.77	10567572	Tristan Buller	No	SUCCESSFUL	
		23/09/2016	23/09/2016	01_045_0115_1_1	7114977139	7	480.11	P2	3360.77	10567573	Tristan Buller	No	SUCCESSFUL	
		24/09/2016	24/09/2016	01_045_0115_1_1	7114977140	7	480.11	P2	3360.77	10567574	Tristan Buller	No	SUCCESSFUL	
		25/09/2016	25/09/2016	01_045_0115_1_1	7114977170	7	480.11	P2	3360.77	10567575	Tristan Buller	No	SUCCESSFUL	

From the participant side, you find payment requests below the budget:



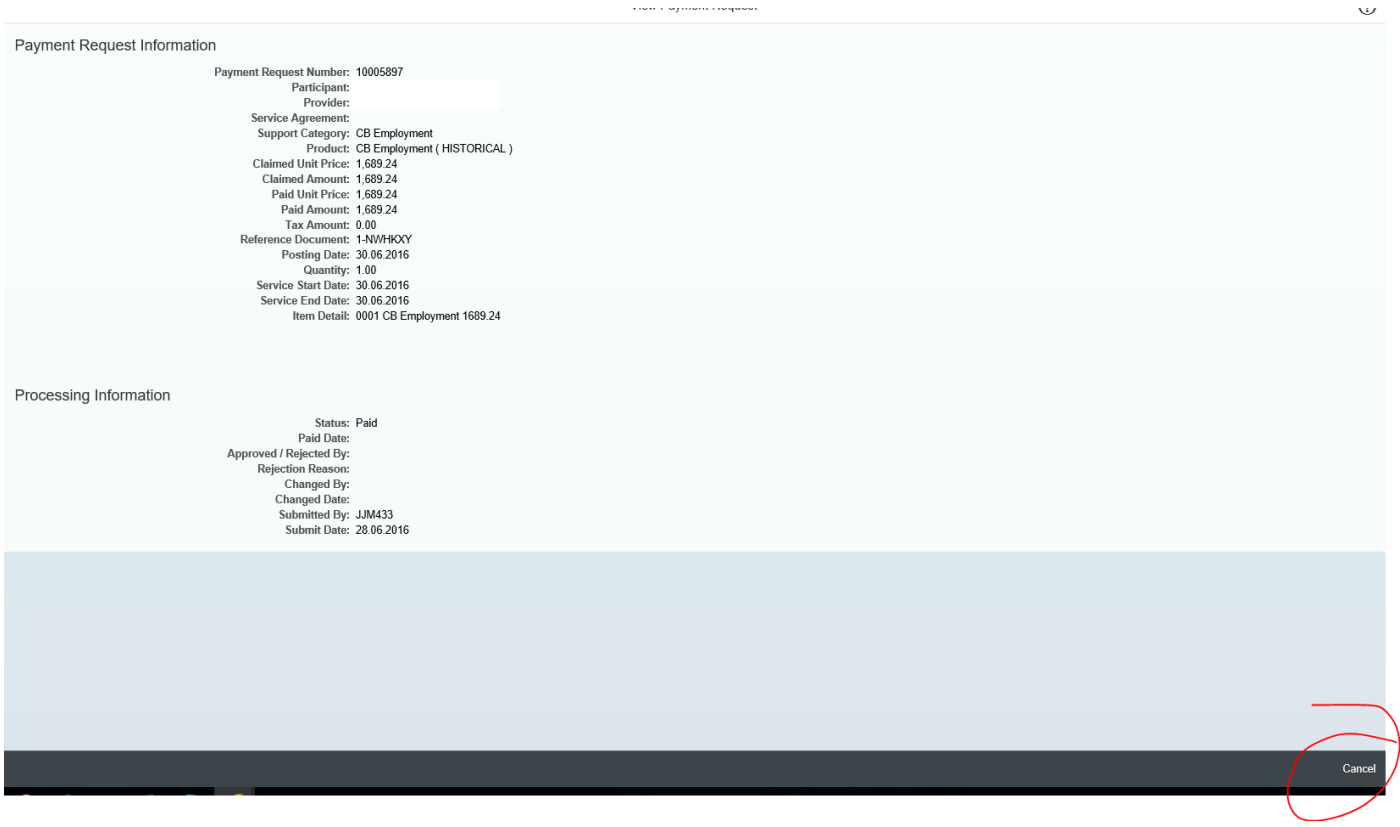


Date	Payment Request	Status	Service Booking	Provider	Support Category	Amount ($)
07.10.2016	10616837	Rejected	50350246	Endeavour Foundation Vic	CB Employment	$1,004.78
22.09.2016	10510340	Rejected	50350246	Endeavour Foundation Vic	CB Employment	$143.54
22.09.2016	10510257	Rejected	50350246	Endeavour Foundation Vic	CB Employment	$430.62
18.08.2016	10222201	Rejected	50350246	Endeavour Foundation Vic	CB Employment	$574.16
18.08.2016	10222116	Paid	50350248	Endeavour Foundation Vic	CB Employment	$422.31
30.06.2016	10005897	Paid		Daniel Kuiper	CB Employment	$1,689.24

Please note, you may need to change the plan dates in order to find the relevant payment. By clicking on the payment id, you can then click cancel.

NDIA staff to add interaction in CRM to record cancelled claim.

NB: if cancellation request relates to pre-1 July, it may require Siebel support in order to cancel the correct item.



2.12 Server issue

Just wondering if the NDIS server is down at the moment or it a problem at our end? The error message is displayed below.

Server Error

/sps/authsvc

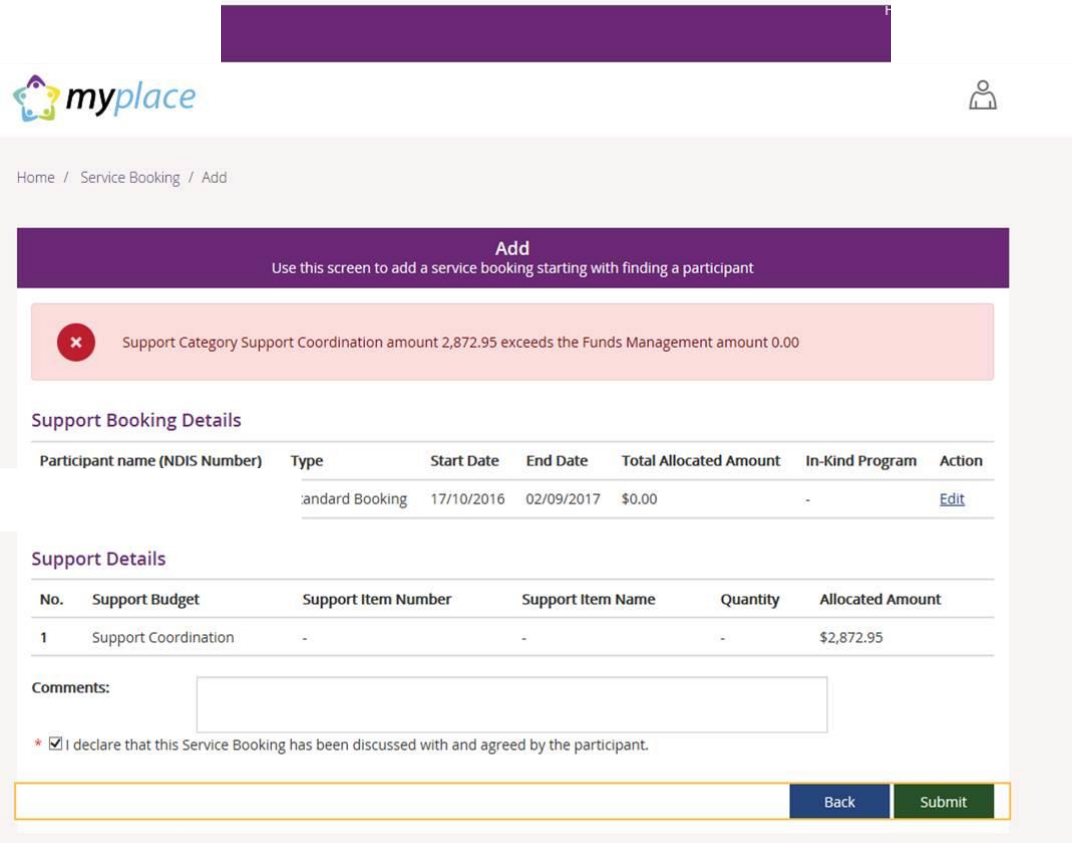
2016-10-16T22:25:13Z

Thanks

Suggested solution

Escalate internally as it is an issue with the server.

2.13 Error when attempting to create service booking: "Support category Support coordination amount x exceeds the fund management 0.00"

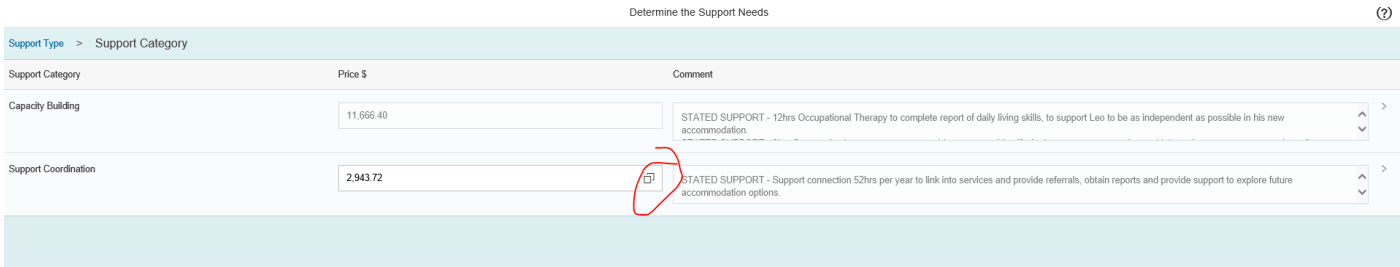


Suggested solution

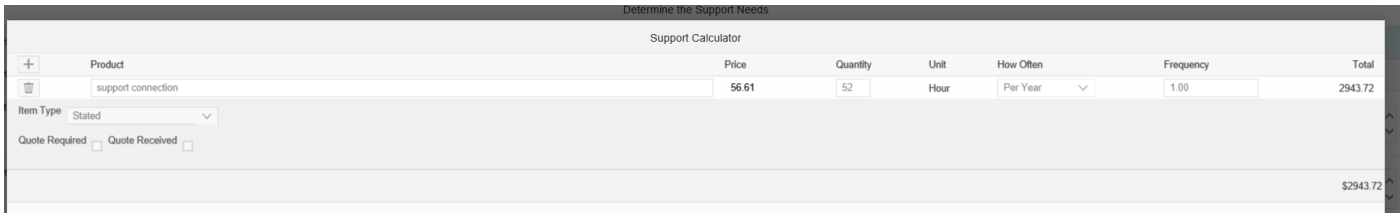
NDIA staff to look at the participant's plan:

In CRM, go to Pathway, select plan, select planning, select determine funded supports (also check determine fund management (to ensure the participant is not self-managed. If self-managed, then the provider needs to invoice the participant directly and not claim through NDIS).

One clicking on supports you can click on the support type.



In this example, it is a stated support, therefore the item needs to be entered at the line item level in the service booking



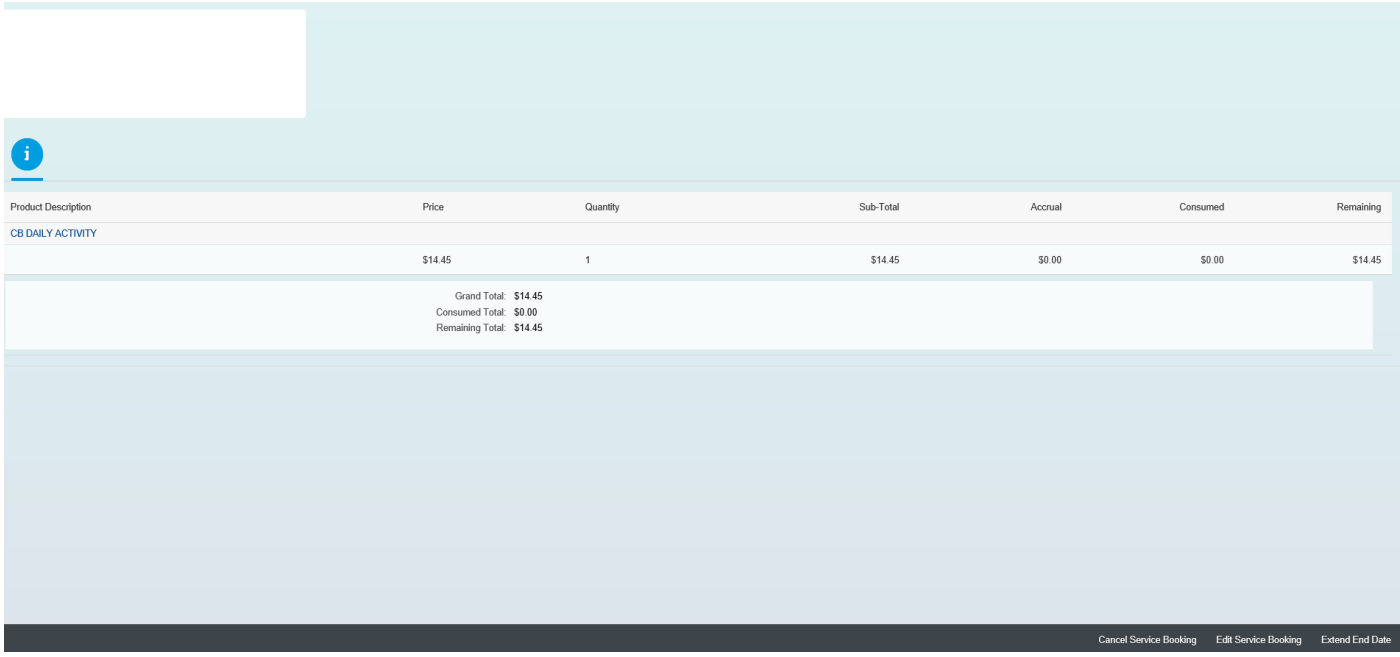
The error message occurred because the plan states the amount at the line item level. When you are entering the service booking you are entering it at the top level, which is why you are receiving the error message.

2.14 Provider has submitted incorrect end date on service booking

<u>Suggested solution</u>

If the provider has incorrectly entered the wrong end date, it is possible to change this date in CRM.

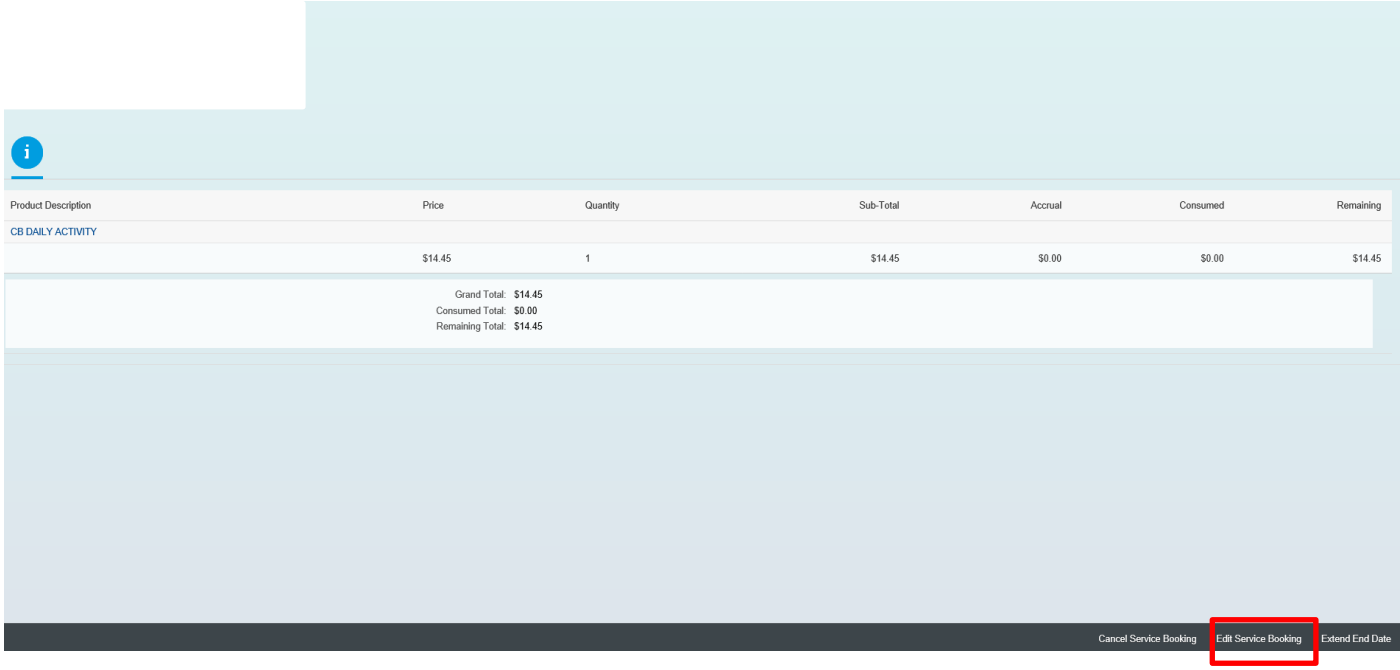
Find the relevant service booking, click on it.



Dates can be altered from the CRM by locating the provider of the incorrect service booking, finding the service booking in question, clicking on it and selecting "Extend End Date" at the bottom left on the CRM screen. Then modify the date and click Submit.

Add interaction to record modification

2.15 Provider has submitted incorrect amount on service booking



Suggested solution

Service booking values can be altered from within the CRM on the same screen as the dates. Find the incorrect service booking from the Bookings list. Click on the incorrect service booking and click on "Edit Service Booking" button at the bottom of the "View Service Booking" screen. Update the service boking amount to the desired amount by clicking on the Edit (little pencil button) and click on Save.

Add interaction to record modification

2.16 Provider receives error message that price used is incorrect. “Products price is not valid on support dates”

Suggested solution

NDIA staff to check the support item price on the Product catalogue and compare with that submitted in the claim. Please note, a price change occurred on 1st July, therefore when making a bulk upload claim, the provider needs to split out the claim at the correct prices for that relevant period. You can review and check the support item price in the product catalogue. The provider has access to this information on the NDIS website under-pricing.

The price per the catalogue is the maximum cap price, please note that providers can submit claims below this ‘maximum price’.

2.17 Service Agreement not approved

Suggested solution

Provider or participant has not accepted the Service Booking
NDIA staff can accept or reject the service booking. Only accept if explicit confirmation from Participant has been provided. Otherwise reject and request provider to re-create service booking and to tick the box ‘approved on the participants behalf’.

2.18 Provider cannot reconcile payment to claim. The amount paid (in our remittance) does not equal amount submitted in bulk upload.

Suggested solution

There may be a number of reasons the provider is unable to reconcile the amount submitted against amount paid.

Reason 1
Some items in the bulk upload had an error and were rejected. In this instance successful + error = amount submitted.

Reason 2
The bulk upload prices submitted were above the maximum per the product catalogue. Rather than CRM rejecting these payment requests, it will adjust the price to the ‘capped’ price.

E.g.
Support item:
10_011_0128_5_3
Employment related assessment and counselling
CB Employment
$175.57
Unit of measure: Hour

Provider submits a price of $177.57 and quantity of 2 in error $355.14. The amount they have submitted being $175.57. The system will cap the price and pay the correct amount $351.14

It may be possible to do a vlookup from the price guide (CSV file) to the amount they submitted in their upload file. (you will need to request the originally uploaded file from the provider).

PSCD

Alternatively you can run a report in PSCD to show the amount paid, then compare this to the uploaded file.

2.19 Bulk upload error: "No budget available in plan"

Suggested solution

This will require NDIA staff to investigate the participant's plan. Check the plan in question, review the remaining balance. Check against the support category the provider is claiming for. If the budget has been fully utilised, notify the provider and advise them to contact the support coordinator or family to ensure the correct allocation and spend.

2.20 Provider states they are unable to create Plan managed service bookings

Suggested solution

The system limiting a PMA to create a service booking is valid. NDIA are required to create the service booking on their behalf. In order to do this, NDIA staff may need to request the service agreement to confirm participant approval (or alternative evidence), and confirmation of the allocated budget for that support item/category.

2.21 Provider requests NDIS create service booking

Suggested solution

Avoid creating service bookings on behalf of providers unless evidence of participant approval has been provided. If Providers states they cannot create a service booking, request screenshots or additional information for what is preventing the creation of the booking in order to investigate further.

2.22 No remittance received

Suggested solution

Advise Providers that they can obtain remittance advice in their inbox on the Portal in PDF or CSV file format.

2.23 Service booking error message: “Plan not approved yet. Service agreement cannot be created”

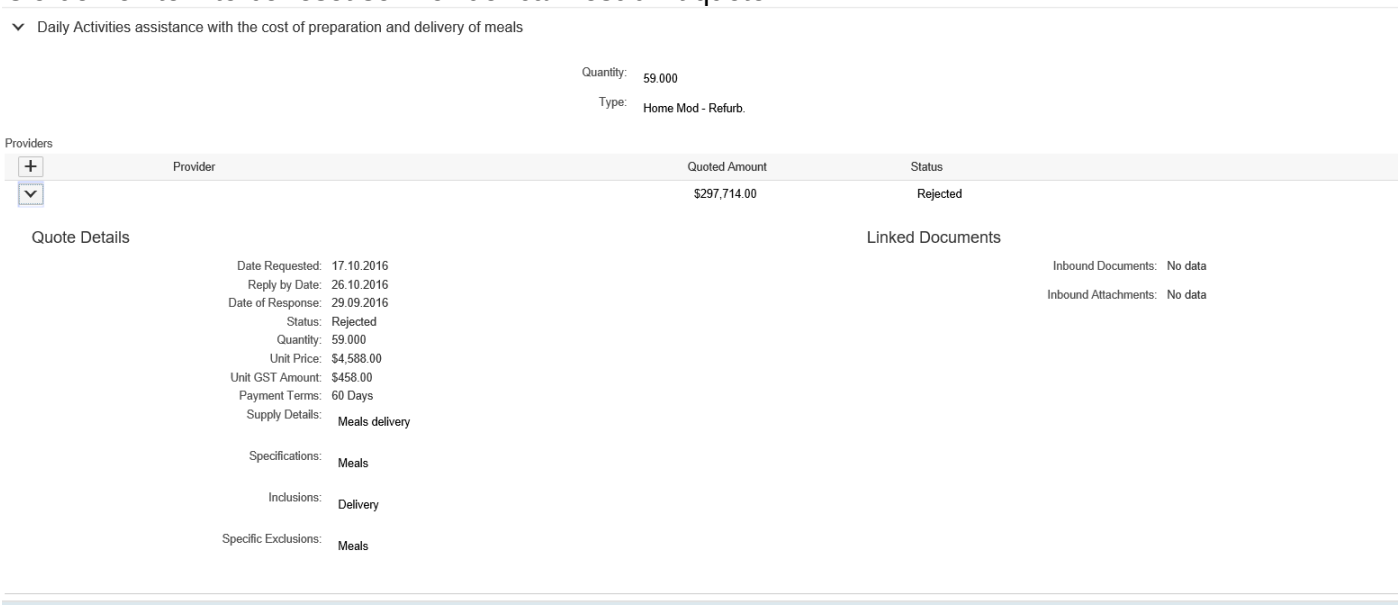
Suggested solution

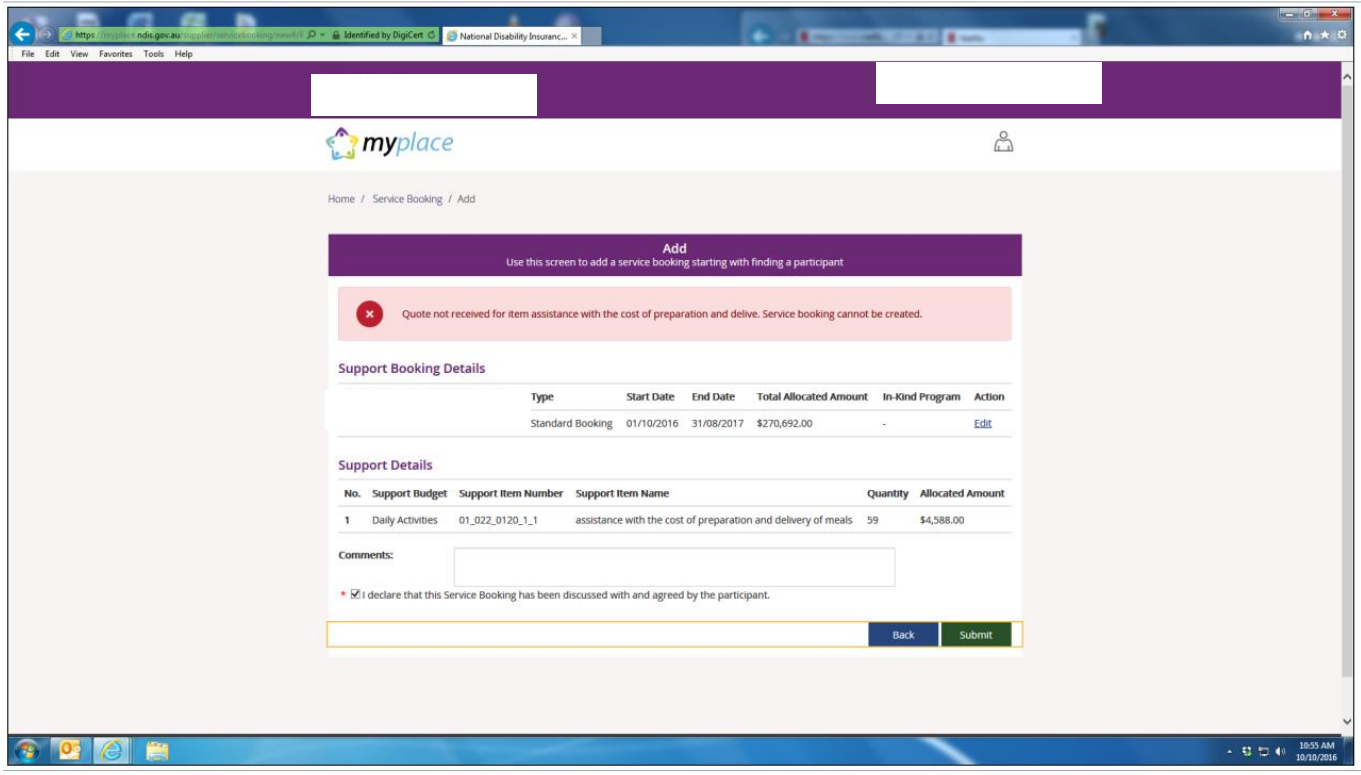
NDIA staff to check pathway in CRM, see if a new plan creation is in progress, advise provider that a new plan is in progress. If not started, or no recent progress, escalate with relevant planning team.

2.24 Quote entered at incorrect amount

Suggested solution

Quote submitted at incorrect price. Instead of unit price x quantity used, the provider entered total price x quantity. NDIA staff are unable to reject so need to reset so the provider can resubmit. Provider submitted quote at total price x quantity rather than unit price x quantity. NDIA staff are not able to reject and re-issue quote for provider to submit. Raise MyIT ticket is order for item to be reset so Provider can resubmit quote.





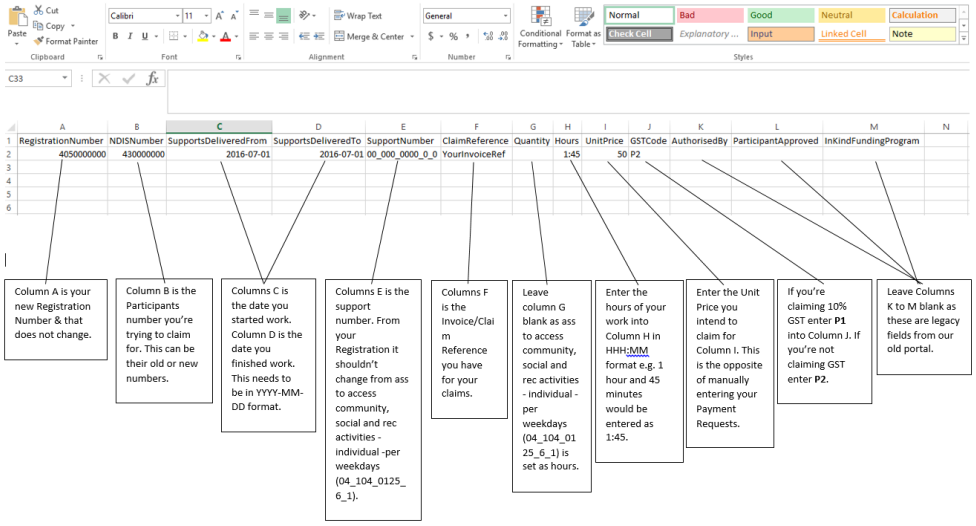
Total amount should have been 4,588, however quote was submitted at quantity (59 x 4,588).

Unable to edit quote, therefore raised as IT ticket.

2.25 Provider does not know how to complete a bulk upload.

<u>Suggested solution</u>

Below is an example sent to a provider to explain what information is required to be submitted. There are also QRG's on the NDIS website which explain the process step by step.



3. Tips

3.1 Service Bookings

Service Bookings are the individual requests for a product or service and are required to process payments in the myPlace portal. Service Bookings are like a request for a service.

myplace allows service bookings to be created between the participant and their service providers.

- One service booking per provider
- Includes all services/ line items to be provided by the provider
- Includes the length of time the service provider will provide the services for
- A provider can only request payment for items in the service booking within the dates specified.
- **Does not replace the service agreement**

In short, the service booking locks a specific support/s to a specific provider within a specified time frame.

More than two providers may have a service booking for the same support category.

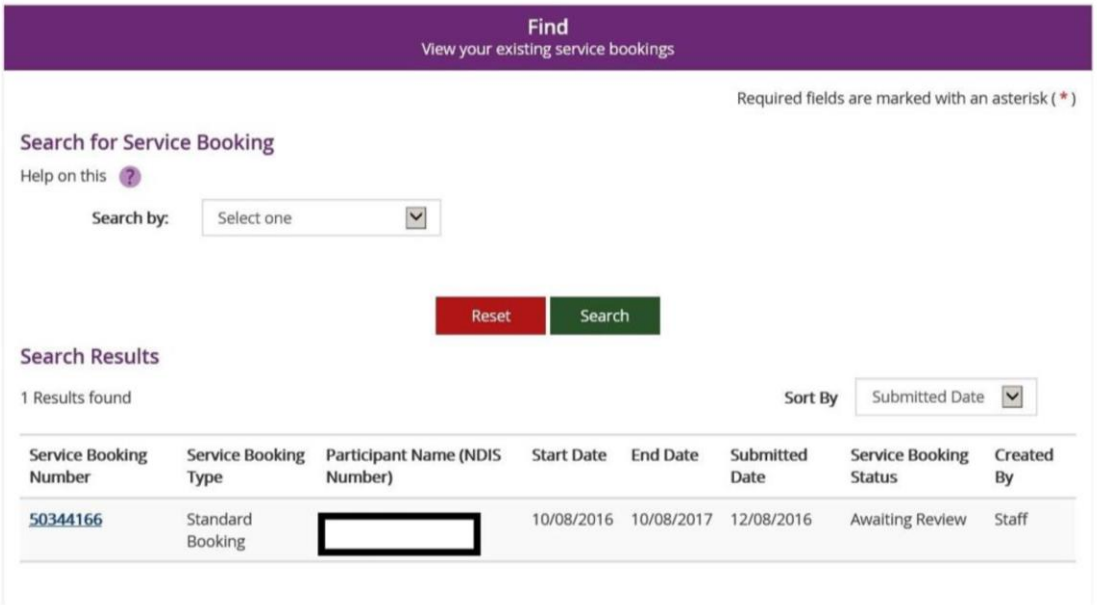
Examples: 30 hours of individual support is allocated in the plan.

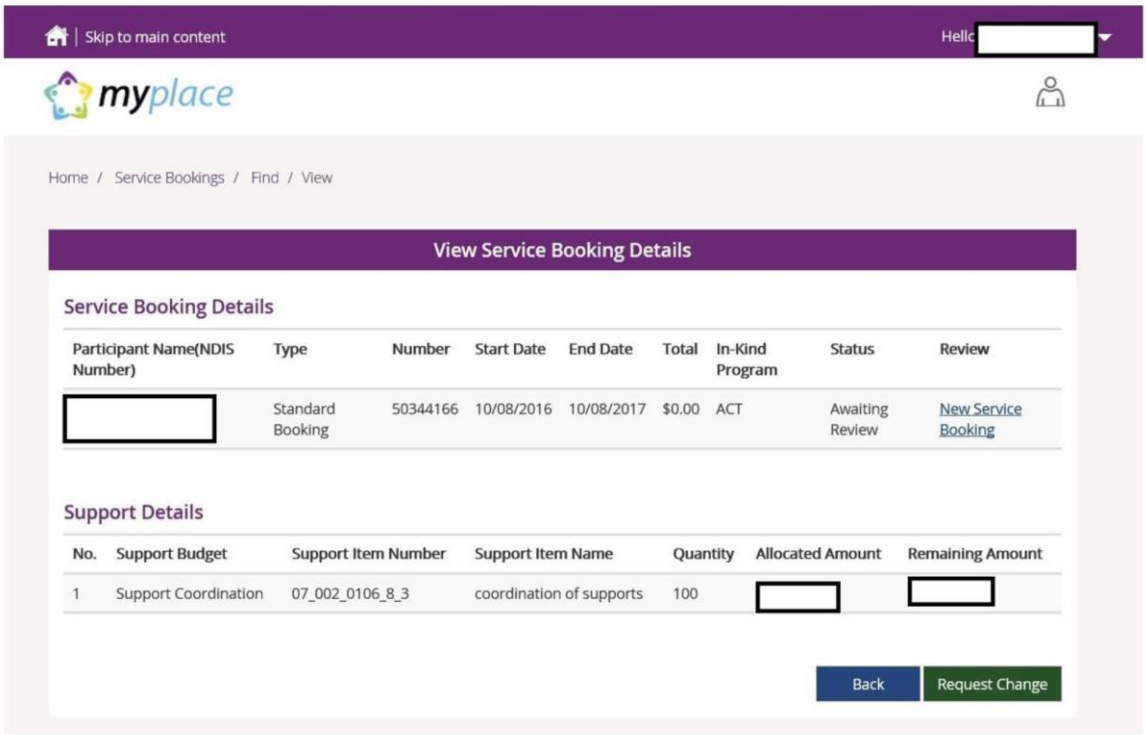
Provider 1: Delivers 10hrs of supports on a weekend, to support in-home outcomes.

Provider 2: Delivers 20hrs of supports during the week to support in-home outcomes.

View service bookings

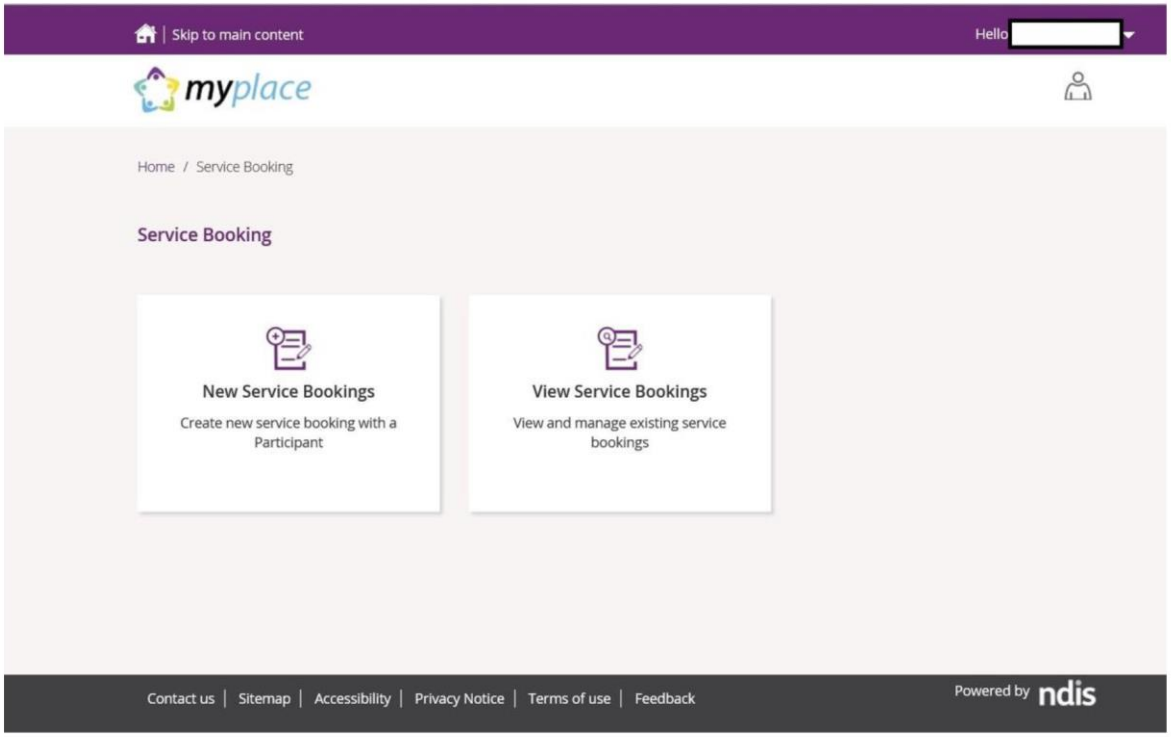
To view details of any service booking, select the **Service Booking Number.**



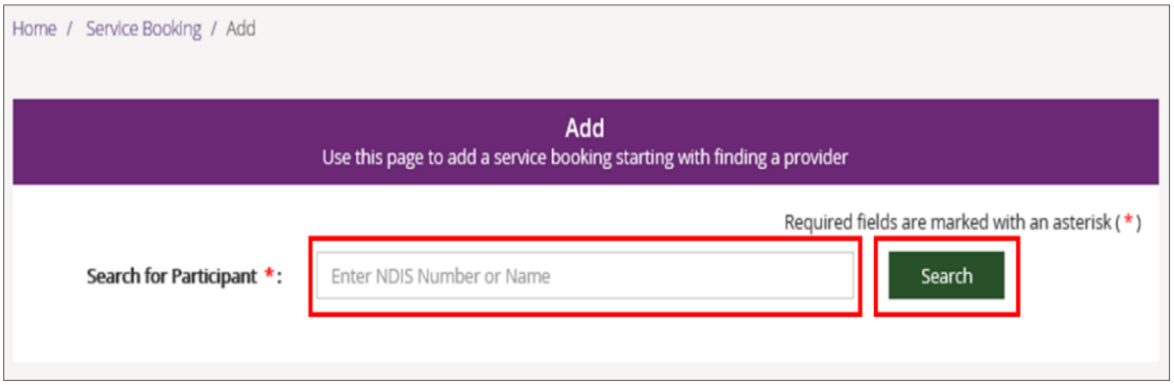


Create a service booking

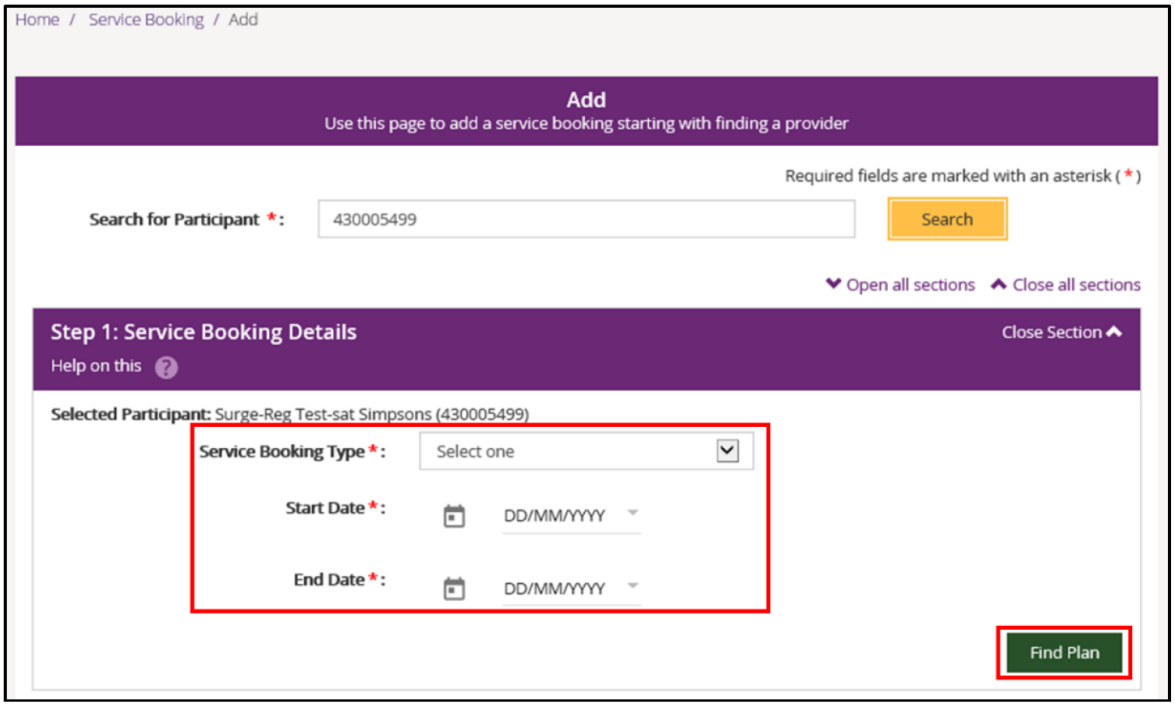
Select the **New Service Booking** tile.



The **Add** Service Booking page opens

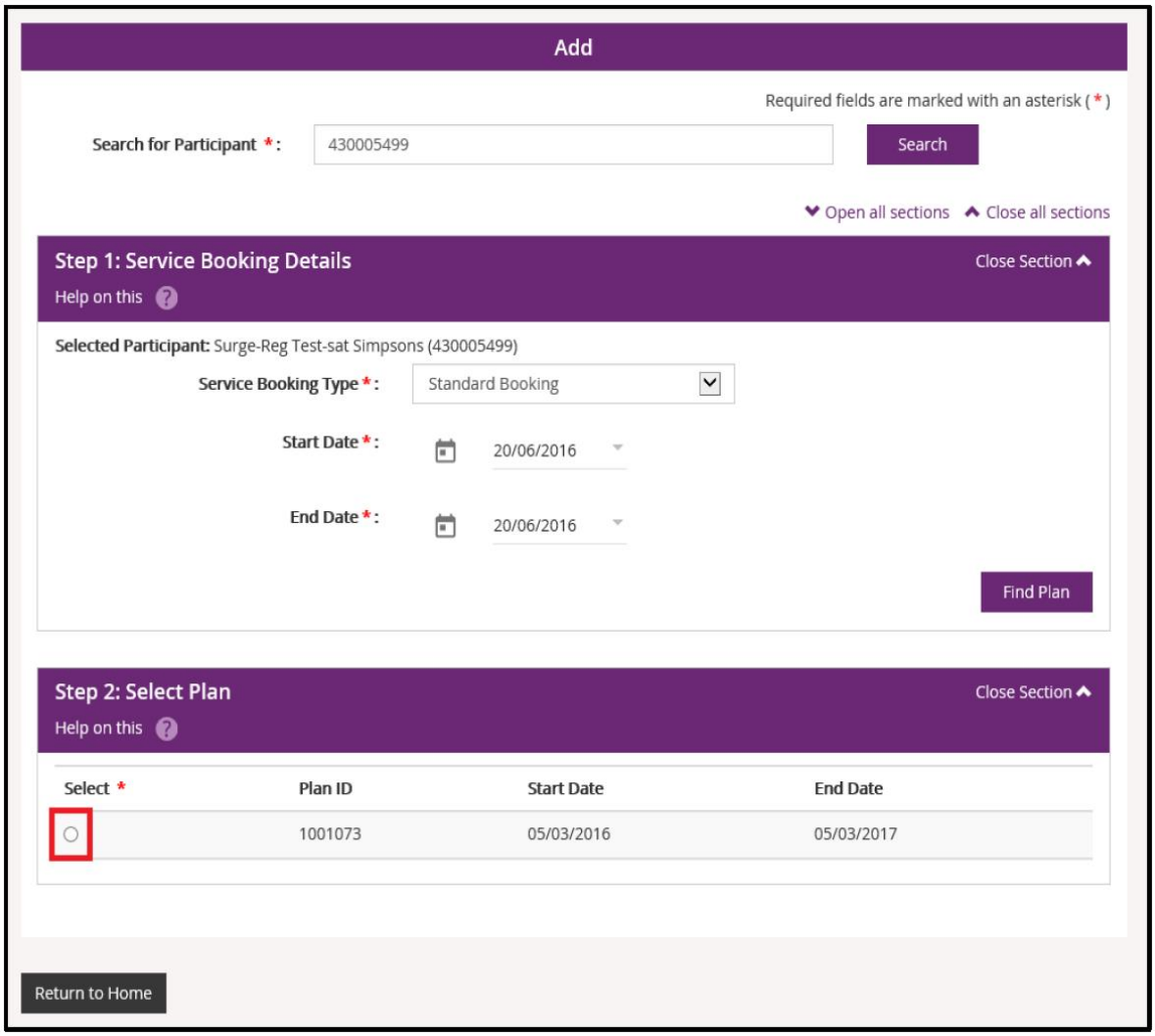


Enter the **NDIS Number** or **Name** of the relevant participant and select **Search**



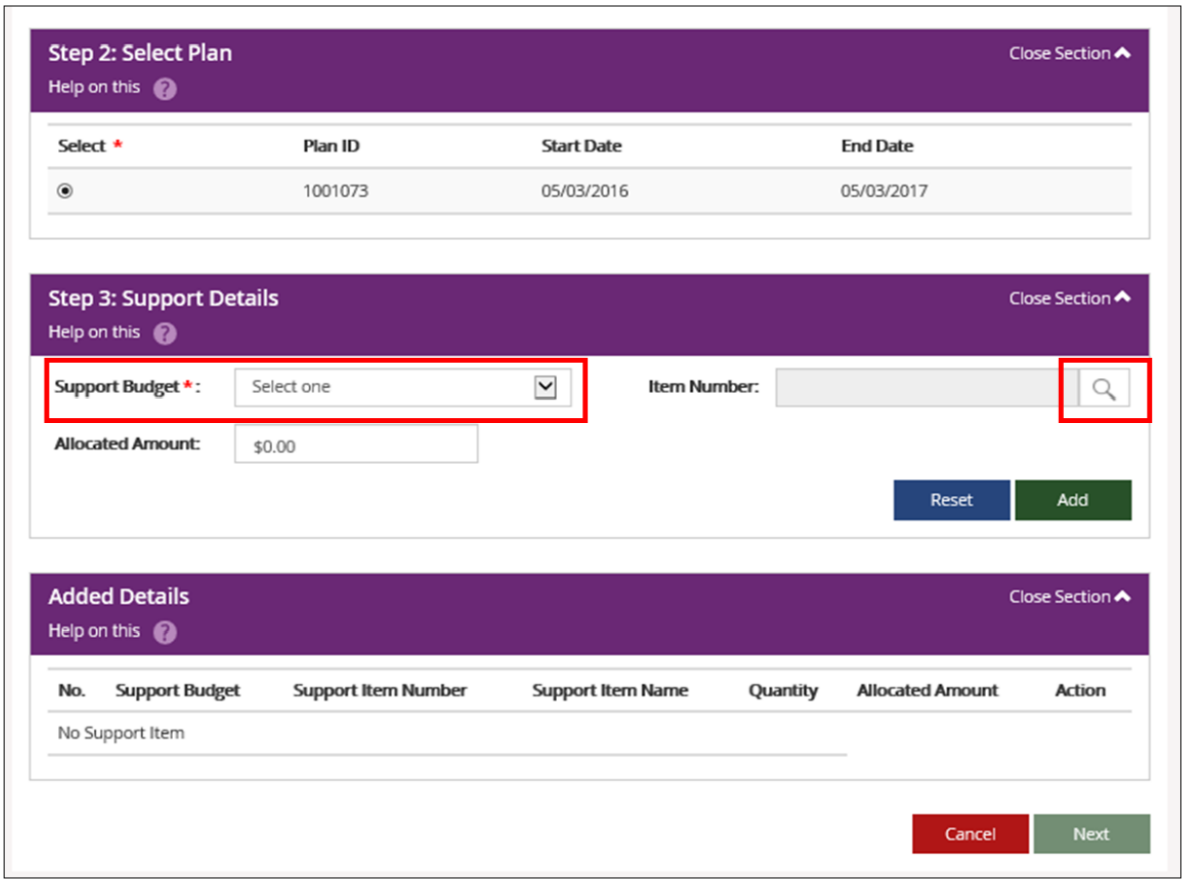
Select the **Service Booking Type**, enter the **Start and End Dates of the Service Booking** and select **Find Plan**

The **Select Plan** section opens



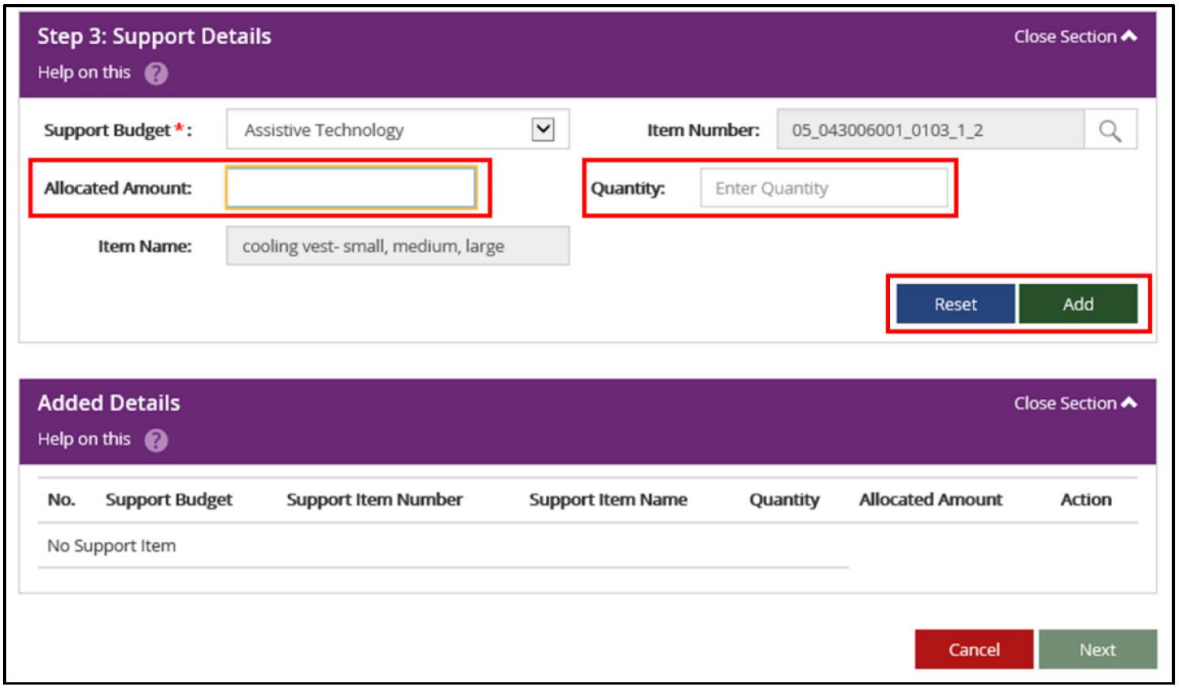
Select the radio button of the plan

The **Support Details** section opens



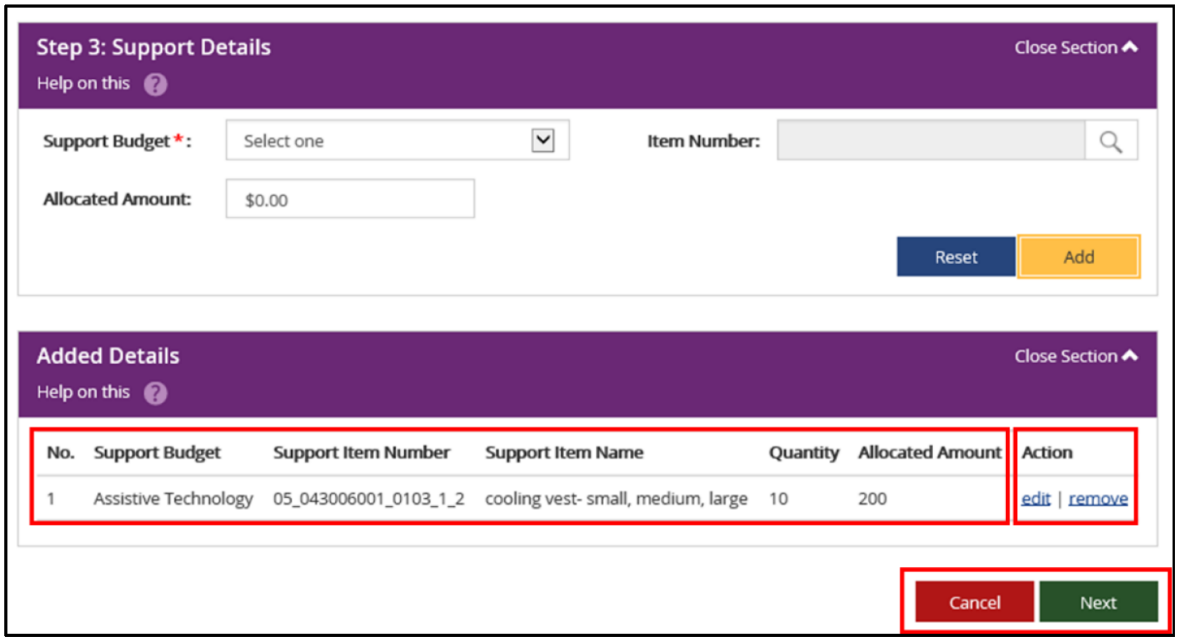
Select the support category using the drop down button for **Support Budget.** Then select the magnifying glass in the **Item Number** field

Enter the **Allocated Amount** and then select **Add**

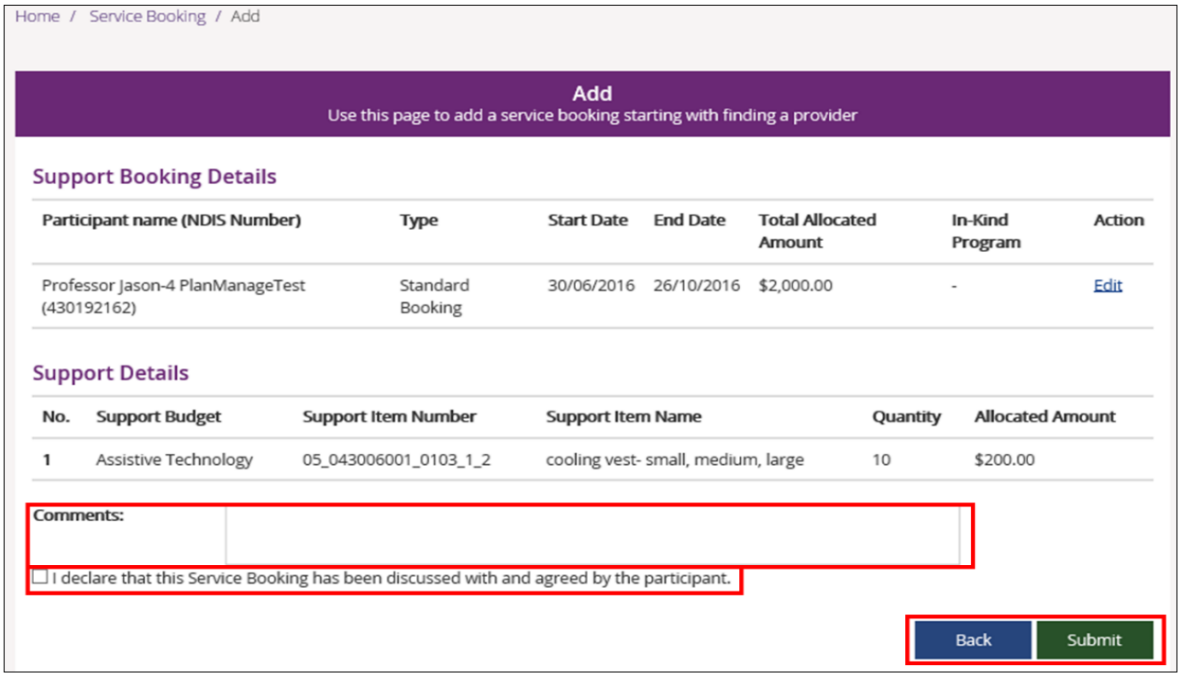


If you need to add another support item, select **Add**

The booking will appear in the **Added Details** section. If it is correct, click **Next**



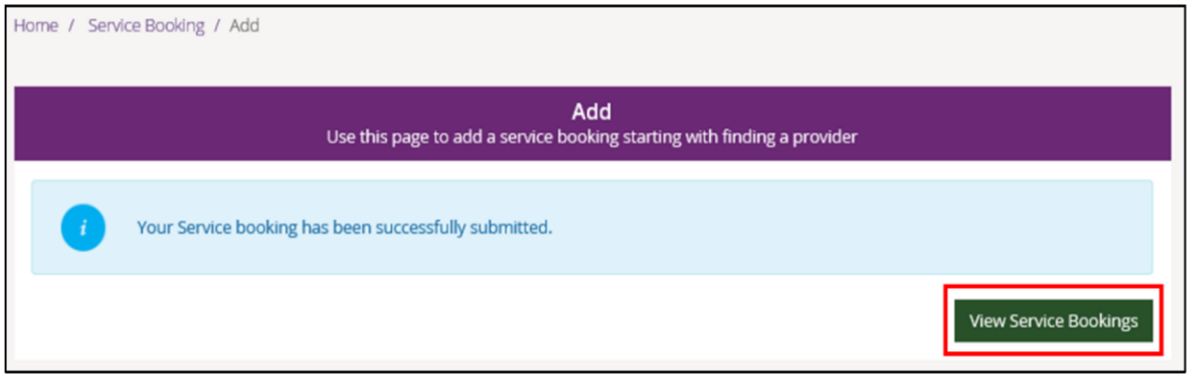
Once you have selected **Next** to continue, the booking and item details display. When you are confident that everything is correct, add any comments to explain the booking (if required), tick the declaration, and select **Submit**



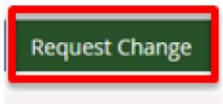
To edit the details of the Service Booking, select **Back**

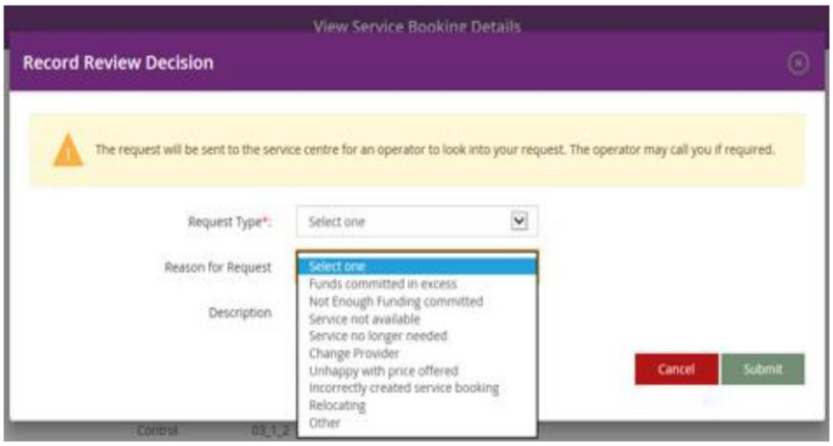
Change a service booking

The booking confirmation page displays



- Select **View Service Bookings** to go directly to that section, which is described in the steps below or select **myplace logo** to return to the homepage





Cancel a service booking

- The service booking may be cancelled after 14 days from the cancellation request in CRM.
- At the time the service booking is cancelled, an assessment will be made to determine the amount of locked funds that should be returned back to the Support Category balance.
- Providers can also cancel a service booking, although it will only take effect after 14 days.
- At the end of the service booking, the provider has up to 60 days to process a claim.

To cancel, select **Cancel Service Booking** and **OK**