

# Provider Portal Tips

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# 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

### Suggested solution

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”

**Add**  
Use this screen to add a service booking starting with finding a participant

✘ Amount \$4818.00 for Core Products is exceeding the remaining budget amount \$0.00

### Support Booking Details

Participant name (NDIS Number)	Type	Start Date	End Date	Total Allocated Amount	In-Kind Program	Action
	Standard Booking	04/09/2016	03/09/2019	\$0.00	-	<a href="#">Edit</a>

### Support Details

No.	Support Budget	Support Item Number	Support Item Name	Quantity	Allocated Amount
1	Transport	-	-	-	\$4,818.00

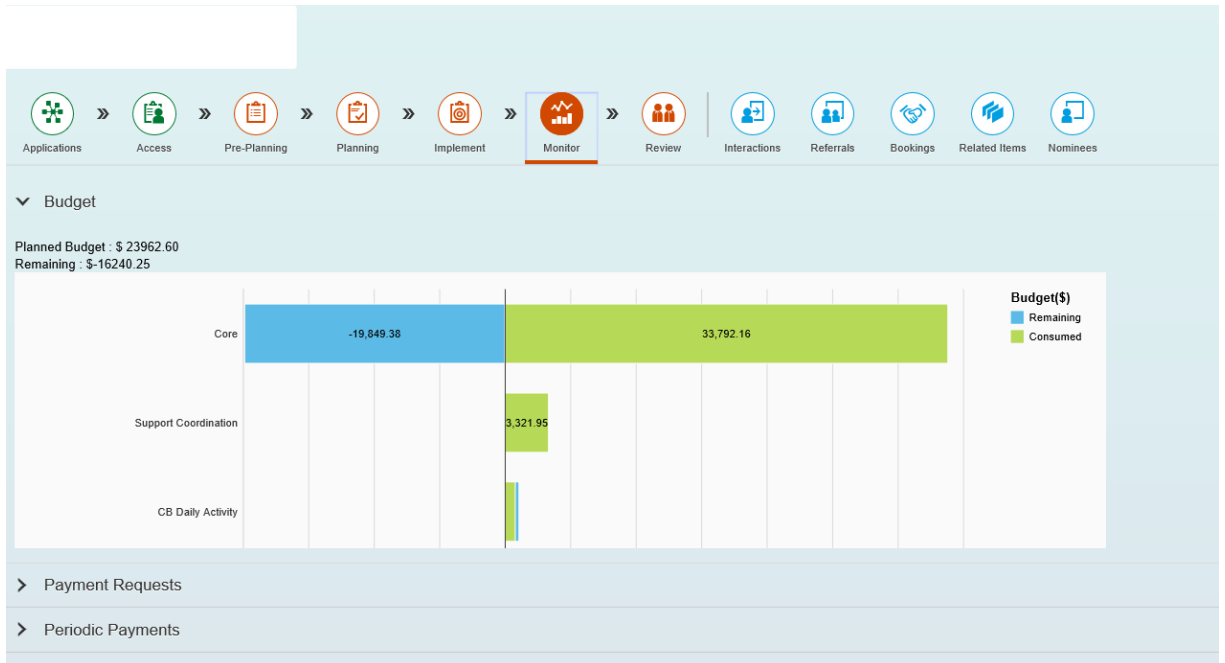
Comments:

I declare that this Service Booking has been discussed with and agreed by the participant.

### 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



### Review Claims

✘ Request No: 000010591319 P03 - Claim amount 124.96 is greater than Participant Budget 16240.25-

**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	06/06/2016	26/06/2016	Social Community and Civic Participation	04_051_0108_1_1	249.92	Years	\$124.96	GST Free	22562

**Claim Amount Summary**

#	Support Category	Total Claim Amount
1	Social Community and Civic Participation	\$124.96
<b>Grand Total</b>		<b>\$124.96</b>

Back Cancel  Submit



## 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.

The screenshot displays the 'Payment Request Details' page. At the top, there is a purple header with the title 'Payment Request Details'. Below this is a 'Payment Request Summary' section with a 'Help on this' link. A table shows the bulk file reference details:

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

Below the table are two columns of details: 'Support Details' and 'Other Details'.

**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:

A red 'Back' button is located at the bottom left of the page.

Pathway:

The screenshot shows a pathway card with the following information:

- Review Application 1042641 [ Migrated ] [ 23.08.2015 - 28.09.2016 ]
- Created on: 27.06.2016
- Employee Responsible: Sarah HUTCHINS

The word 'Migrated' is circled in red.

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

**Cancel Claim Requests**

Selection Options

Bulk Request Id	<input type="text"/>
Posting Date	18.10.2016
Cancel Request Upload File	<input type="text"/>
<input type="checkbox"/> Skip Header Line	

[Download file template](#)

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

### Suggested solution

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:

NDIS Number  
Siebel NDIS N

Overview Contacts Details Interactions Appointments Feedback Pathway Bookings **Budget** Disabilities Referrals Documents Internal Use Streaming

Approved Plan Application 1026686 06 03 2014 - 18 08 2015

Planned Budget : \$ 9,906.84  
Remaining : \$ 9,906.84

Budget(\$)  
Remaining 1,572.29  
Consumed 4,388.11

Support Coordination 4,388.11

- > Payment Requests
- > Orphaned Incomplete Payment Requests
- > Periodic Payments

Budget Approved Plan: Review Application 1051298 17.03.2016 - 16.03.2018

Payment Requests

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

> Orphaned Incomplete Payment Requests

> Periodic Payments

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.

Payment Request Information

Payment Request Number: 10005897  
 Participant:  
 Provider:  
 Service Agreement:  
 Support Category: CB Employment  
 Product: CB Employment ( HISTORICAL )  
 Claimed Unit Price: 1,689.24  
 Claimed Amount: 1,689.24  
 Paid Unit Price: 1,689.24  
 Paid Amount: 1,689.24  
 Tax Amount: 0.00  
 Reference Document: 1-NWHKQY  
 Posting Date: 30.06.2016  
 Quantity: 1.00  
 Service Start Date: 30.06.2016  
 Service End Date: 30.06.2016  
 Item Detail: 0001 CB Employment 1689.24

Processing Information

Status: Paid  
 Paid Date:  
 Approved / Rejected By:  
 Rejection Reason:  
 Changed By:  
 Changed Date:  
 Submitted By: JMM433  
 Submit Date: 28.06.2016

Cancel

## 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

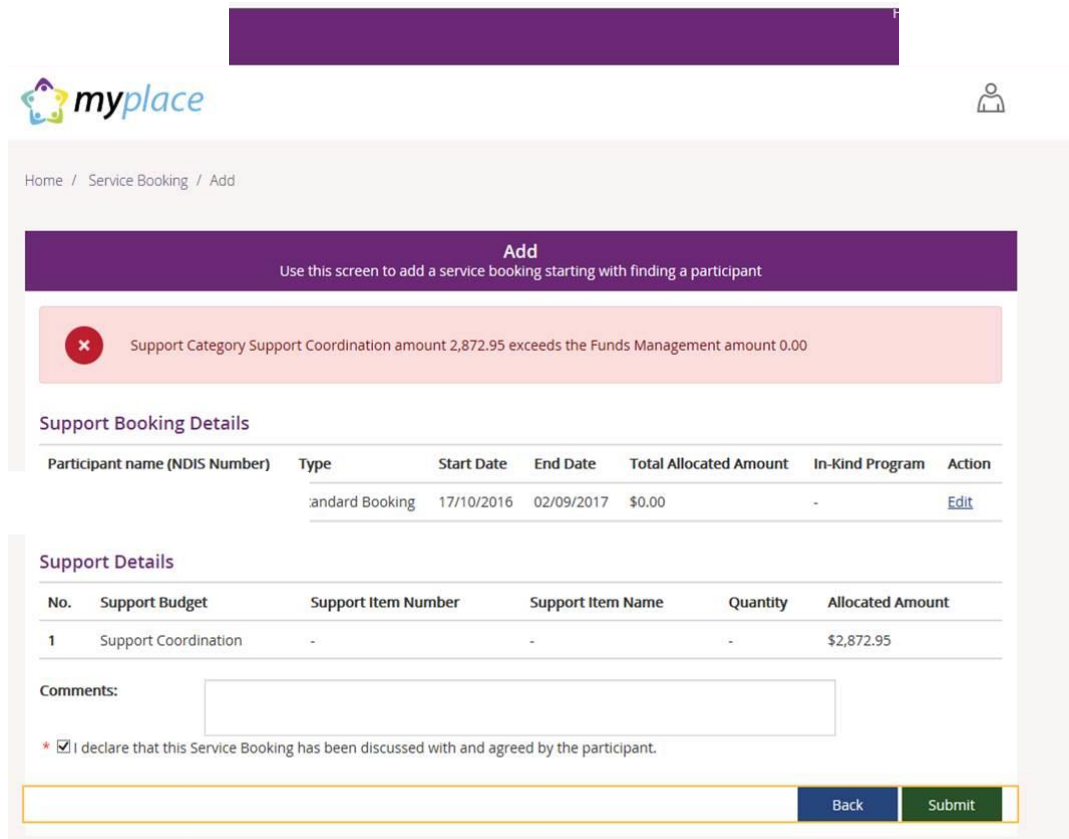
2016-10-16T22:25:13Z

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”



The screenshot shows the 'myplace' service booking interface. At the top, there is a purple header with the text 'Add' and 'Use this screen to add a service booking starting with finding a participant'. Below this, a red error message box displays the error: 'Support Category Support Coordination amount 2,872.95 exceeds the Funds Management amount 0.00'. The interface includes sections for 'Support Booking Details' and 'Support Details'. The 'Support Booking Details' table has columns for Participant name (NDIS Number), Type, Start Date, End Date, Total Allocated Amount, In-Kind Program, and Action. The 'Support Details' table has columns for No., Support Budget, Support Item Number, Support Item Name, Quantity, and Allocated Amount. A 'Comments' field is present, followed by a checkbox declaration: '\*  I declare that this Service Booking has been discussed with and agreed by the participant.' At the bottom right, there are 'Back' and 'Submit' buttons.

Participant name (NDIS Number)	Type	Start Date	End Date	Total Allocated Amount	In-Kind Program	Action
	Standard Booking	17/10/2016	02/09/2017	\$0.00	-	<a href="#">Edit</a>

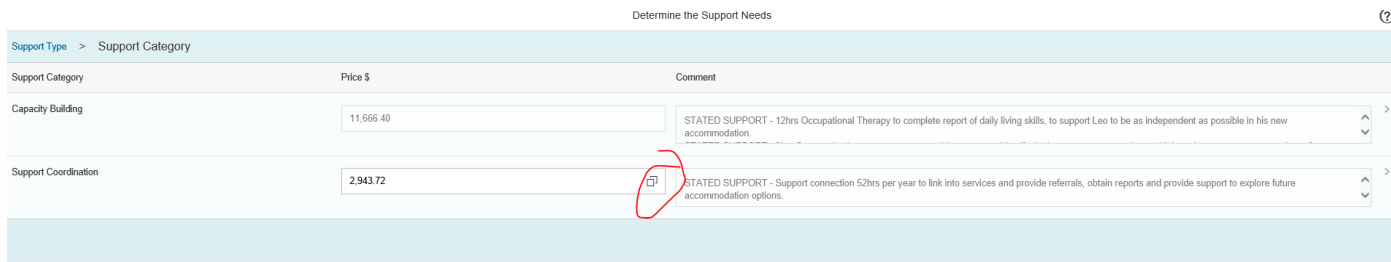
No.	Support Budget	Support Item Number	Support Item Name	Quantity	Allocated Amount
1	Support Coordination	-	-	-	\$2,872.95

### 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.



Support Category	Price \$	Comment
Capacity Building	11,666.40	STATED SUPPORT - 12hrs Occupational Therapy to complete report of daily living skills, to support Leo to be as independent as possible in his new accommodation.
Support Coordination	2,943.72	STATED SUPPORT - Support connection 52hrs per year to link into services and provide referrals, obtain reports and provide support to explore future accommodation options.

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



Product	Price	Quantity	Unit	How Often	Frequency	Total
support connection	56.61	52	Hour	Per Year	1.00	2943.72

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

### Suggested solution

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.

Product Description	Price	Quantity	Sub-Total	Accrual	Consumed	Remaining
CB DAILY ACTIVITY	\$14.45	1	\$14.45	\$0.00	\$0.00	\$14.45

Grand Total: \$14.45  
 Consumed Total: \$0.00  
 Remaining Total: \$14.45

[Cancel Service Booking](#)   [Edit Service Booking](#)   [Extend End Date](#)

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

Product Description	Price	Quantity	Sub-Total	Accrual	Consumed	Remaining
CB DAILY ACTIVITY	\$14.45	1	\$14.45	\$0.00	\$0.00	\$14.45

Grand Total: \$14.45  
 Consumed Total: \$0.00  
 Remaining Total: \$14.45

[Cancel Service Booking](#)   [Edit Service Booking](#)   [Extend End Date](#)



### 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 booking 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 1<sup>st</sup> 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 in order for item to be reset so Provider can resubmit quote.

- ▼ Daily Activities assistance with the cost of preparation and delivery of meals

Quantity: 59,000

Type: Home Mod - Refurb.

Providers

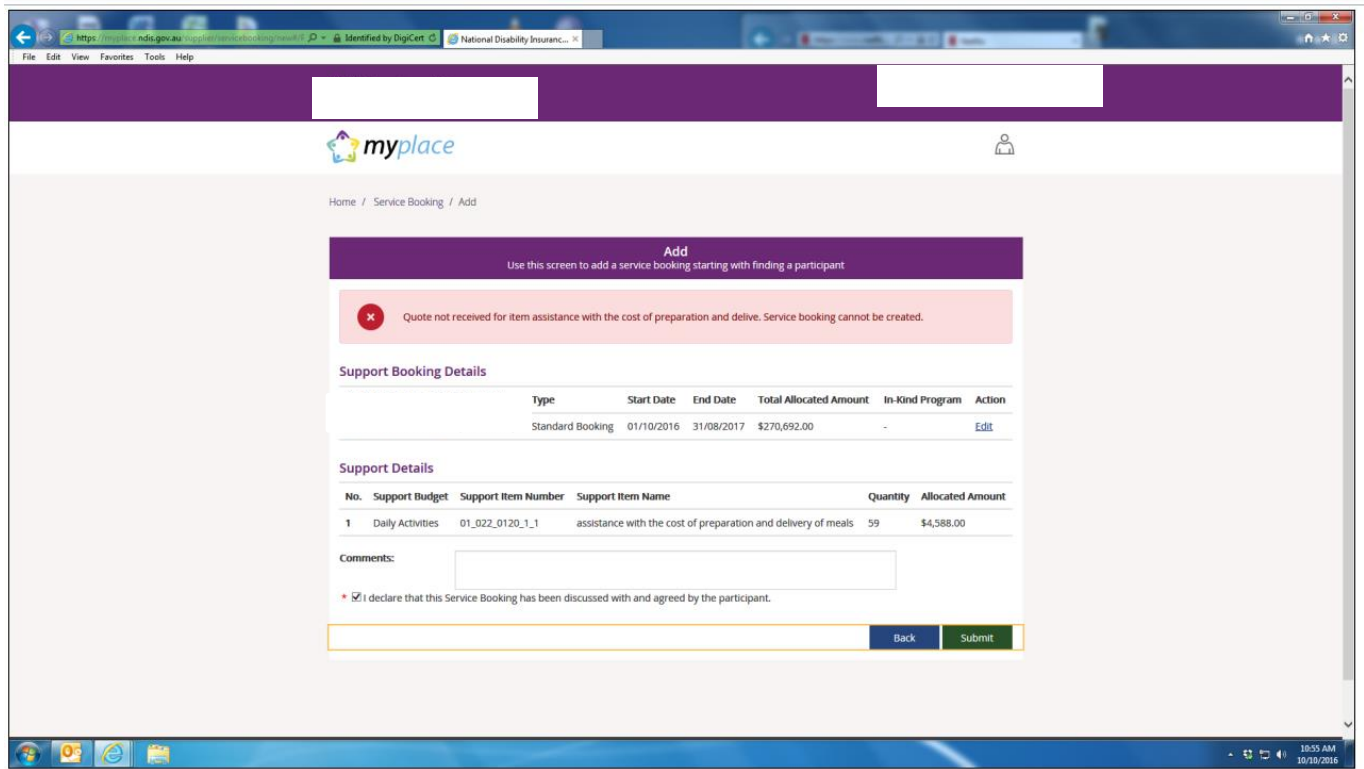
<input type="checkbox"/>	Provider	Quoted Amount	Status
<input checked="" type="checkbox"/>		\$297,714.00	Rejected

Quote Details

Date Requested: 17.10.2016  
Reply by Date: 26.10.2016  
Date of Response: 29.09.2016  
Status: Rejected  
Quantity: 59,000  
Unit Price: \$4,588.00  
Unit GST Amount: \$458.00  
Payment Terms: 60 Days  
Supply Details: Meals delivery  
Specifications: Meals  
Inclusions: Delivery  
Specific Exclusions: Meals

Linked Documents

Inbound Documents: No data  
Inbound Attachments: No data



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.

### Suggested solution

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.

The screenshot shows an Excel spreadsheet with the following columns: RegistrationNumber, NDISNumber, SupportsDeliveredFrom, SupportsDeliveredTo, SupportNumber, ClaimReference, Quantity, Hours, UnitPrice, GSTCode, AuthorisedBy, ParticipantApproved, and InKindFundingProgram. The spreadsheet contains data for a single row: RegistrationNumber 405000000, NDISNumber 430000000, SupportsDeliveredFrom 2016-07-01, SupportsDeliveredTo 2016-07-01, SupportNumber 00\_000\_0000\_0\_0, ClaimReference YourInvoiceRef, Quantity 1, Hours 1:45, UnitPrice 30 P2, GSTCode P2, AuthorisedBy, ParticipantApproved, and InKindFundingProgram. Below the spreadsheet, there are several text boxes with arrows pointing to specific columns, providing instructions:

- Column A is your new Registration Number & that does not change.
- Column B is the Participants number you're trying to claim for. This can be their old or new numbers.
- Columns C is the date you started work. Column D is the date you finished work. This needs to be in YYYY-MM-DD format.
- Columns E is the support number. From your Registration it shouldn't change from ass to access community, social and rec activities - individual - per weekdays (04\_104\_0125\_6\_1).
- Columns F is the Invoice/Claim Reference you have for your claims.
- Leave column G blank as ass to access community, social and rec activities - individual - per weekdays (04\_104\_0125\_6\_1) is set as hours.
- Enter the hours of your work into Column H in HH:MM format e.g. 1 hour and 45 minutes would be entered as 1:45.
- Enter the Unit Price you intend to claim for Column I. This is the opposite of manually entering your Payment Requests.
- If you're claiming 10% GST enter P1 into Column J. If you're not claiming GST enter P2.
- Leave Columns K to M blank as these are legacy fields from our old portal.

## 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**.

Find  
View your existing service bookings

Required fields are marked with an asterisk (\*)

Search for Service Booking  
Help on this ?

Search by: Select one

Reset Search

Search Results  
1 Results found

Sort By Submitted Date

Service Booking Number	Service Booking Type	Participant Name (NDIS Number)	Start Date	End Date	Submitted Date	Service Booking Status	Created By
<a href="#">50344166</a>	Standard Booking		10/08/2016	10/08/2017	12/08/2016	Awaiting Review	Staff

Home / Service Bookings / Find / View

### View Service Booking Details

Service Booking Details

Participant Name(NDIS Number)	Type	Number	Start Date	End Date	Total	In-Kind Program	Status	Review
<input type="text"/>	Standard Booking	50344166	10/08/2016	10/08/2017	\$0.00	ACT	Awaiting Review	<a href="#">New Service Booking</a>

Support Details

No.	Support Budget	Support Item Number	Support Item Name	Quantity	Allocated Amount	Remaining Amount
1	Support Coordination	07_002_0106_8_3	coordination of supports	100	<input type="text"/>	<input type="text"/>


[Back](#) [Request Change](#)

## Create a service booking


Select the **New Service Booking** tile.

Home / Service Booking

### Service Booking



**New Service Bookings**  
Create new service booking with a Participant

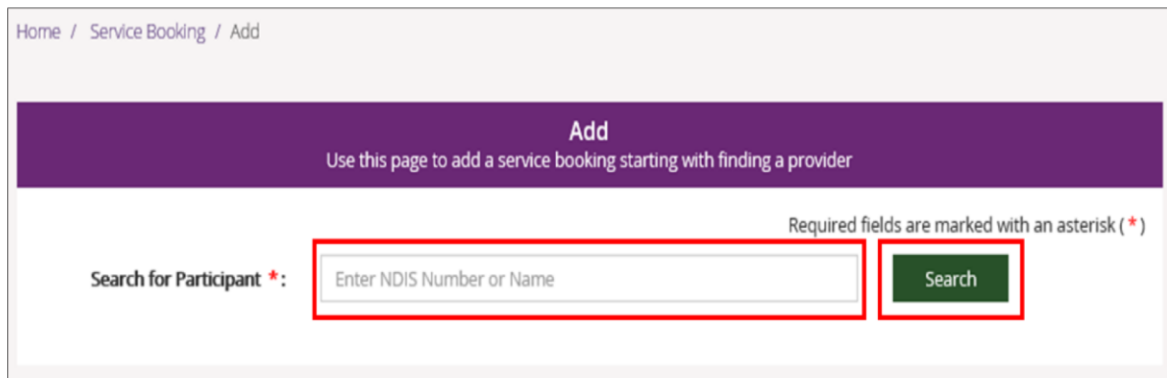


**View Service Bookings**  
View and manage existing service bookings

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Powered by **ndis**

The **Add** Service Booking page opens



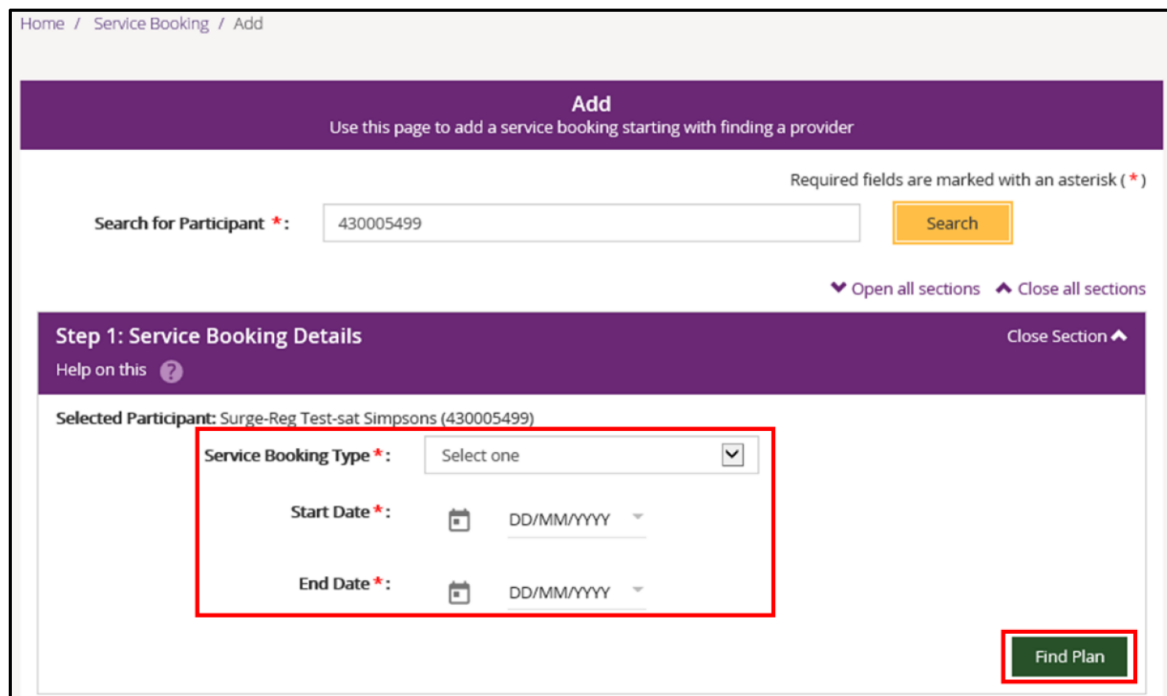
Home / Service Booking / Add

**Add**  
Use this page to add a service booking starting with finding a provider

Required fields are marked with an asterisk (\*)

Search for Participant \*:

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



Home / Service Booking / Add

**Add**  
Use this page to add a service booking starting with finding a provider

Required fields are marked with an asterisk (\*)

Search for Participant \*:

▼ Open all sections ▲ Close all sections

**Step 1: Service Booking Details** Close Section ▲

Help on this ?

Selected Participant: Surge-Reg Test-sat Simpsons (430005499)

**Service Booking Type** \*:  ▼

**Start Date** \*:  ▼

**End Date** \*:  ▼

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

The **Select Plan** section opens

The screenshot shows a web form titled "Add" with a purple header. At the top right, it says "Required fields are marked with an asterisk (\*)". Below this is a search field for a participant ID (430005499) and a "Search" button. There are also links to "Open all sections" and "Close all sections".

**Step 1: Service Booking Details** (Close Section ^)

Help on this ?

Selected Participant: Surge-Reg Test-sat Simpsons (430005499)

Service Booking Type \*: Standard Booking (dropdown)

Start Date \*: 20/06/2016 (calendar icon)

End Date \*: 20/06/2016 (calendar icon)

Find Plan button

**Step 2: Select Plan** (Close Section ^)

Help on this ?

Select *	Plan ID	Start Date	End Date
<input type="radio"/>	1001073	05/03/2016	05/03/2017

Return to Home button

Select the radio button of the plan

The **Support Details** section opens



**Step 2: Select Plan** Close Section ^  
 Help on this ?

Select *	Plan ID	Start Date	End Date
<input type="radio"/>	1001073	05/03/2016	05/03/2017

---

**Step 3: Support Details** Close Section ^  
 Help on this ?

**Support Budget \***:   **Item Number:**

**Allocated Amount:**

---

**Added Details** Close Section ^  
 Help on this ?

No.	Support Budget	Support Item Number	Support Item Name	Quantity	Allocated Amount	Action
No Support Item						

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**

**Step 3: Support Details** Close Section ^  
 Help on this ?

**Support Budget \***:   **Item Number:**

**Allocated Amount:**  **Quantity:**

**Item Name:**

---

**Added Details** Close Section ^  
 Help on this ?

No.	Support Budget	Support Item Number	Support Item Name	Quantity	Allocated Amount	Action
No Support Item						

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**

No.	Support Budget	Support Item Number	Support Item Name	Quantity	Allocated Amount	Action
1	Assistive Technology	05_043006001_0103_1_2	cooling vest- small, medium, large	10	200	<a href="#">edit</a>   <a href="#">remove</a>

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**

Participant name (NDIS Number)	Type	Start Date	End Date	Total Allocated Amount	In-Kind Program	Action
Professor Jason-4 PlanManageTest (430192162)	Standard Booking	30/06/2016	26/10/2016	\$2,000.00	-	<a href="#">Edit</a>

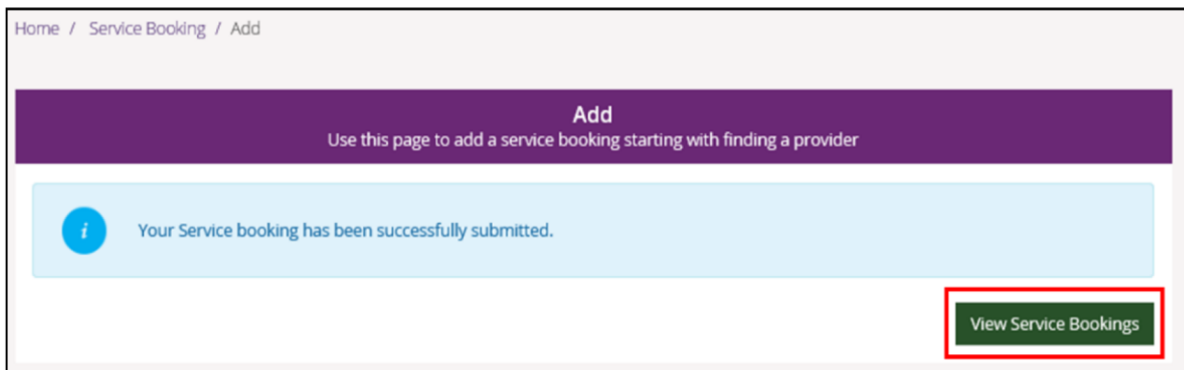
No.	Support Budget	Support Item Number	Support Item Name	Quantity	Allocated Amount
1	Assistive Technology	05_043006001_0103_1_2	cooling vest- small, medium, large	10	\$200.00

I declare that this Service Booking has been discussed with and agreed by the participant.

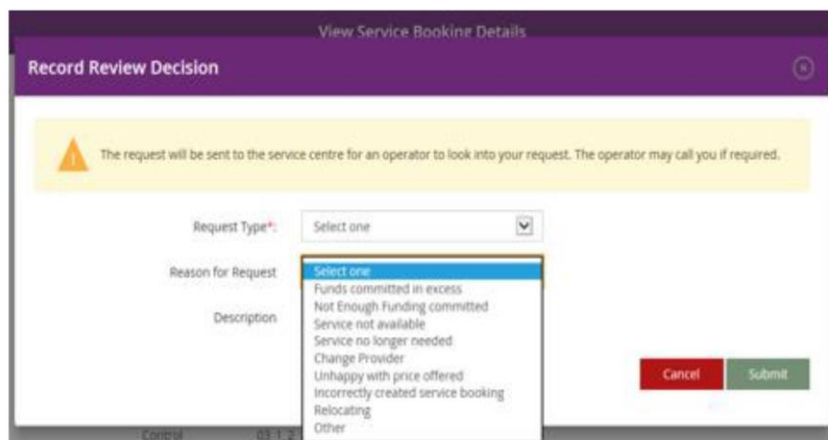
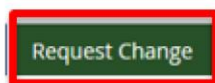
To edit the details of the Service Booking, select **Back**

## 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**