

NDIS myplace portal

Step-by-step guide

My payment request

May 2024



Table of Contents

Table of Contents	2
Changes from the last version.....	3
My Payment Request	3
Add My Payment Request.....	4
View My Payment Requests.....	9
Cancel Payment Requests	12
My Messages.....	15
Leaving Feedback	16
Logging out of myplace	17

Changes from the last version

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

- General updates

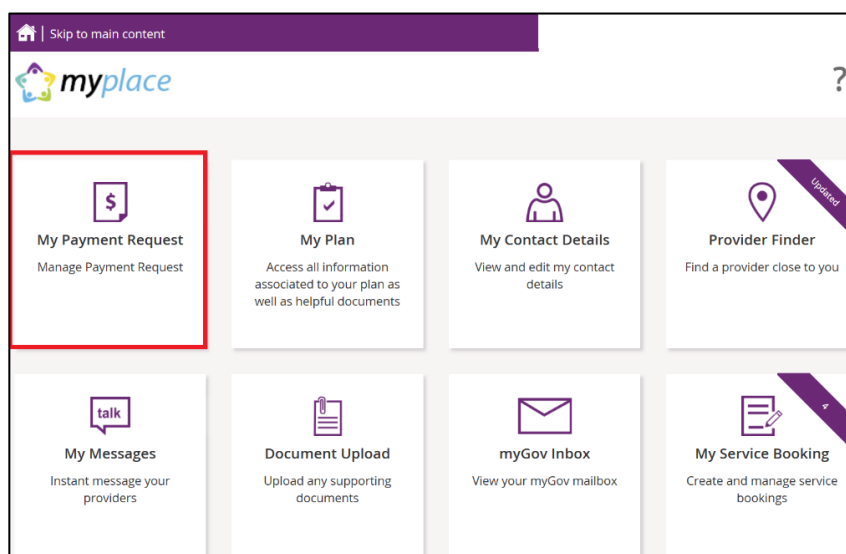
My Payment Request

Through **My Payment Request** you can create payment requests (only for self-managed participants) and view all past payment requests (including periodic transport).

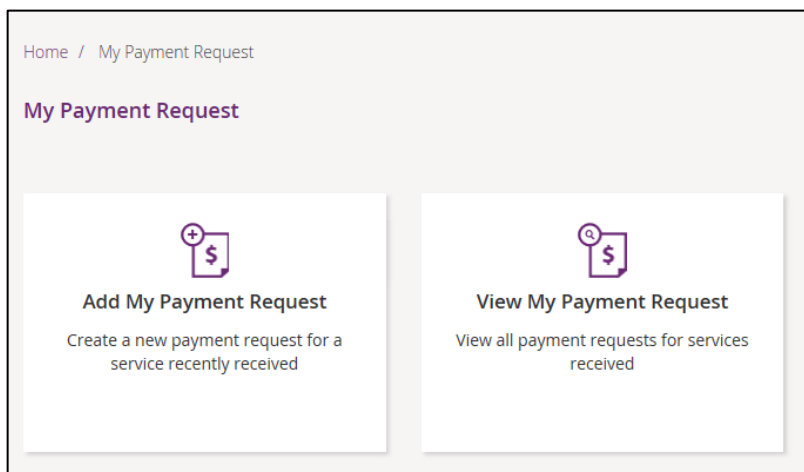
Note:

- If you have a new plan in the new computer system, you must sign into the my NDIS portal to make a claim against your current plan.
- You will be able to see, filter and search for claims made against your previous plan in the myplace portal.
- You may be able to claim for services and supports up to 90 days after the old plan has expired in the myplace portal.

1. Click **My Payment Request** on the homepage.



The **My Payment Request** screen displays.



You have two tiles:

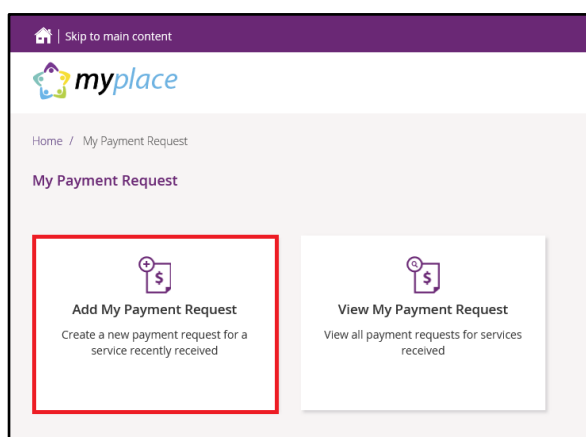
- **Add My Payment Request** – to create new payment requests.
- **View My Payment Request** – to see the details of all payment requests that have been submitted.

Add My Payment Request

This section is only for self-managed funded supports. Payment requests for funding that is Agency managed or plan managed will be submitted by providers.

Ensure you have your bank account details recorded (in **My Contact Details**) before you submit your payment request.

1. Click the **Add My Payment Request** tile on the **My Payment Request** screen.



The **Add Payment Request** screen displays.

Add Payment Request
 Please enter the details of your payment request

Required fields are marked with an asterisk (*)

Payment Request Details
 New Payment Request - Help ?

Support Start Date: *

Support End Date: *

Support Category: *

Claim Type:

Cancellation Reason:

Payment Amount: *

Provider, Business or Person:

Description:

Add Another

Cancel
Next

2. Enter the details of your payment request. The **Support Start Date** field and **Support End Date** field will default to today's date (change if required). Select the **Support Category** and **Claim Type** from the drop-down list and enter the **Payment Amount**.
3. To help you track your payments, please enter the name of the payee in the **Provider, Business or Person** field and the **Description** of the payment. The provider, business or person name and description field are both optional fields.

Note: For more than one payment request, click the **Add Another** button in the lower right-hand corner of the window.

Add Payment Request

Please enter the details of your payment request

Required fields are marked with an asterisk (*)

Payment Request Details

New Payment Request - Help ?

Support Start Date: *

23/06/2020

Support End Date: *

23/06/2020

Support Category: *

Please Select Category

Claim Type:

Direct service

Cancellation Reason:

Payment Amount: *

eg. 0.00

Provider, Business or Person:

Description:

Add Another

Cancel

Next

- Once all details have been entered, click the **Next** button on the lower right-hand side of window.

Add Payment Request
 Please enter the details of your payment request

Required fields are marked with an asterisk (*)

Payment Request Details
 New Payment Request - Help ?

Support Start Date: *

Support End Date: *

Support Category: *

Claim Type:

Cancellation Reason:

Payment Amount: *

Provider, Business or Person:

Description:

Add Another

Next

Cancel

The **Preview** page displays.

Preview
 Please review your payment request before submitting

Payment Request Details

Support Start Date:
 25/07/2018

Support End Date:
 27/07/2018

Support Category:
 SOCIAL,COMMUNITY AND CIVIC PARTICIPATION

Claim Type:
 Standard

Cancellation Reason:
 (empty)

Payment Amount:
 \$1.00

Payment Request Amount Summary

#	Support Category	Total Amount
1	SOCIAL,COMMUNITY AND CIVIC PARTICIPATION	\$1.00
Grand Total		\$1.00

Declaration*

☐ The support category listed on this payment request will be recorded on my NDIS plan. I understand that I may be audited by the NDIS to verify the amounts submitted in this payment request. I certify that the information provided on this payment request is true and correct.


Back

Submit

- Check the details are correct and then tick the **Declaration** box. Click the **Submit** button on the bottom right-hand side of screen.

- The **Confirmation** screen displays, stating that your payment request has been received.

Confirmation

 Your Payment Requests have been received

Payment Request Details

#	Payment Request Number	Support Budget	Claim Type	Cancellation Reason	Support Start Date	Support End Date	Payment Total	Status	Rejection Reason
1	10271638	Consumables	Direct service		10/03/2020	10/03/2020	\$150.00	Pending Payment	

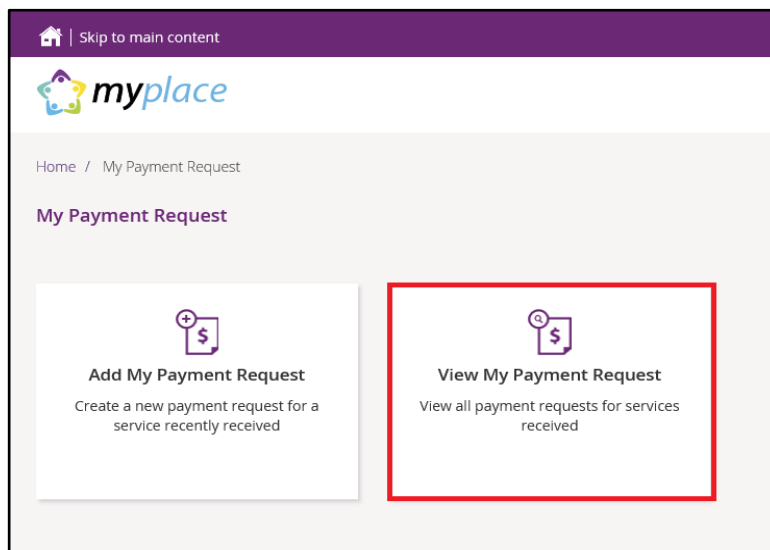
View Payment Requests

You can return to the home page or go to **View Payment Requests**.

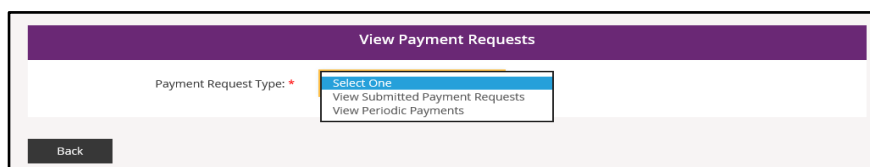
View My Payment Requests

You can view the payment requests that were submitted by you, a provider or an NDIA staff member. Periodic transport payments can also be viewed in this screen.

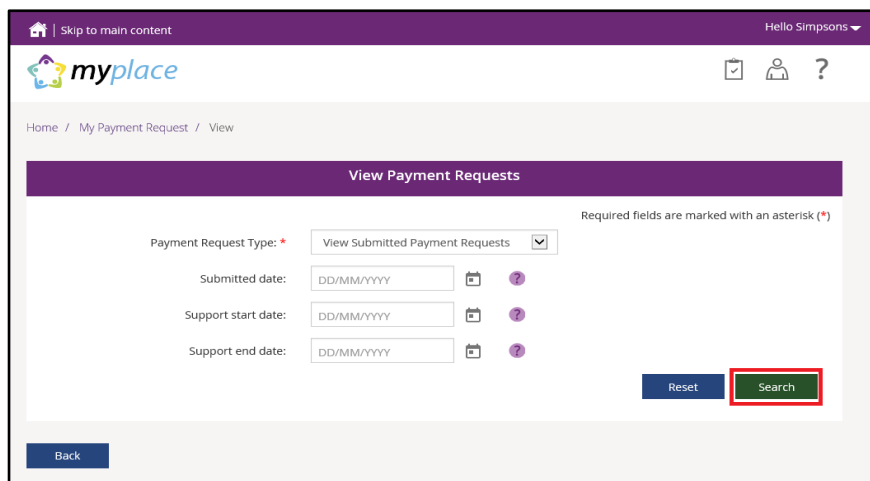
1. Click the **My Payment Request** tile on the home page.
2. Select the **View My Payment Request** tile.



The **View Payment Requests** page displays.



3. Choose the **Payment Request Type** from the drop-down menu. The following steps are an example for submitted payment requests.
4. For **View Submitted Payment Requests**, the following screen displays.





myplace



Home / My Payment Request / View



View Payment Requests

Required fields are marked with an asterisk (*)

Payment Request Type: *

Submitted date:  

Support start date:  

Support end date:  

- Click the **Search** button for a full list of all requests, or type in dates to view payments within a selected time period. A list of your payment requests display.

Search Results - Submitted Claim

Showing 1 - 7 of 7 payment requests

Payment Request Number	Submitted Date	Support Category	Support Start Date	Support End Date	Payment Total	Status
10585554	19/08/2021	Consumables	19/08/2021	19/08/2021	\$10.00	Paid
10585555	19/08/2021	Initial Supports	19/08/2021	19/08/2021	\$10.00	Awaiting Approval
10585556	19/08/2021	Home Modifications	19/08/2021	19/08/2021	\$100.00	Awaiting Approval
10585646	19/08/2021	Social Community and Civic Participation	19/08/2021	19/08/2021	\$10.00	Awaiting Approval
10585660	19/08/2021	Support Coordination	19/08/2021	19/08/2021	\$10.00	Awaiting Approval
10585663	19/08/2021	Consumables	19/08/2021	19/08/2021	\$50.00	Awaiting Approval
10585664	19/08/2021	Support Coordination	19/08/2021	19/08/2021	\$20.00	Awaiting Approval

- You can navigate through the payment request results by clicking the **First**, **Back**, **Next** and **Last** buttons.
- Click on the **Payment Request Number** to view details about the payment request.

Note: You will see the payee's ABN number (if applicable), when you or your representative have made a payment request using the my NDIS app or a NDIA staff member has made a claim on your behalf.

View Payment Request

View a list of your Payment Request.

Payment Request Summary

Help on this ?

Provider/Claimed By	Payment Request Number	Payment Amount	Status
Amar11082021 Self04 (430000000)	10585555	\$10.00	Awaiting Approval

Support Details

Start Date:

19/08/2021

End Date:

19/08/2021

Category:

Initial Supports

Claim Type:

Direct service

Cancellation Reason:

Amount:

10.00

Provider, Business or Person:

hard wheelbarrow

Description:

test description

Other Details

Submitted on:

19/08/2021

Submitted By:

BUSINESS ADMIN11

Reject Reason:

Paid on:

Payee ABN:

61643018982

To support your payment request you may attach your invoice

Upload Document

Back to Payment Request

Cancel Payment Requests

You can cancel payment requests you have submitted and payment requests that a nominee or child representative have submitted if they have the status of **Paid** and/or **Pending**.

Note:

- A Nominee or child representative can only cancel payment requests submitted by themselves.
- You will see the Payee's ABN number (if applicable), when you or your representative have made a payment request using the my NDIS app or an NDIA staff member has made a claim on your behalf.

1. In **View Payment Requests**, click on the **Payment Request Number** link.

Search Results - Submitted Claim						
Showing 1 - 7 of 7 payment requests						
Payment Request Number	Submitted Date	Support Category	Support Start Date	Support End Date	Payment Total	Status
10585554	19/08/2021	Consumables	19/08/2021	19/08/2021	\$10.00	Paid
10585555	19/08/2021	Initial Supports	19/08/2021	19/08/2021	\$10.00	Awaiting Approval
10585556	19/08/2021	Home Modifications	19/08/2021	19/08/2021	\$100.00	Awaiting Approval
10585646	19/08/2021	Social Community and Civic Participation	19/08/2021	19/08/2021	\$10.00	Awaiting Approval
10585660	19/08/2021	Support Coordination	19/08/2021	19/08/2021	\$10.00	Awaiting Approval
10585663	19/08/2021	Consumables	19/08/2021	19/08/2021	\$50.00	Awaiting Approval
10585664	19/08/2021	Support Coordination	19/08/2021	19/08/2021	\$20.00	Awaiting Approval

[Return to My Payment Request](#)

2. A summary of the payment request displays.

View Payment Request

View a list of your Payment Request.

Payment Request Summary

Help on this ?

Provider/Claimed By	Payment Request Number	Payment Amount	Status
Amar11082021 Self04 (430000000)	10585554	\$10.00	Paid

Support Details

Start Date:

19/08/2021

End Date:

19/08/2021

Category:

Consumables

Claim Type:

Direct service

Cancellation Reason:

Amount:

10.00

Provider, Business or Person:

Hard Wheelbarrow

Description:

test description

Other Details

Submitted on:

19/08/2021

Submitted By:

AMAR11082021 SELF04

Reject Reason:

Paid on:

20/08/2021

Payee ABN:

Not applicable

To support your payment request you may attach your invoice

Upload Document

Back to Payment Request

Cancel Payment

- Click the **Cancel Payment** button on the bottom right-hand corner of the window.

Note: If the **Cancel Payment** button is not available, please contact NDIS.

View Payment Request

View a list of your Payment Request.

Payment Request Summary

Help on this ?

Provider/Claimed By	Payment Request Number	Payment Amount	Status
Amar11082021 Self04 (430000000)	10585554	\$10.00	Paid

Support Details

Start Date: 19/08/2021

End Date: 19/08/2021

Category: Consumables

Claim Type: Direct service

Cancellation Reason: Amount: 10.00

Provider, Business or Person: Hard Wheelbarrow

Description: test description

Other Details

Submitted on: 19/08/2021

Submitted By: AMAR11082021 SELF04

Reject Reason: Paid on: 20/08/2021

Payee ABN: Not applicable

To support your payment request you may attach your invoice

Upload Document

Back to Payment Request


Cancel Payment

- Select the **Yes** button to cancel the payment request.

Are you sure you would like to cancel the selected payment?

YES NO

You are returned to the **View Payment Requests** page. A confirmation message will display, confirming the payment request has been cancelled successfully.



You have successfully cancelled your payment request. If the payment request had a status of 'Paid' you will either receive an invoice from the NDIA, or the amount will be offset against future payment requests.

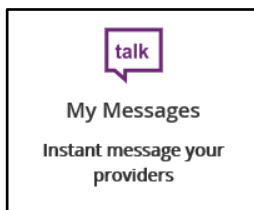
- Select **Home** to return to the main homepage.

Home / My Payment Request / View

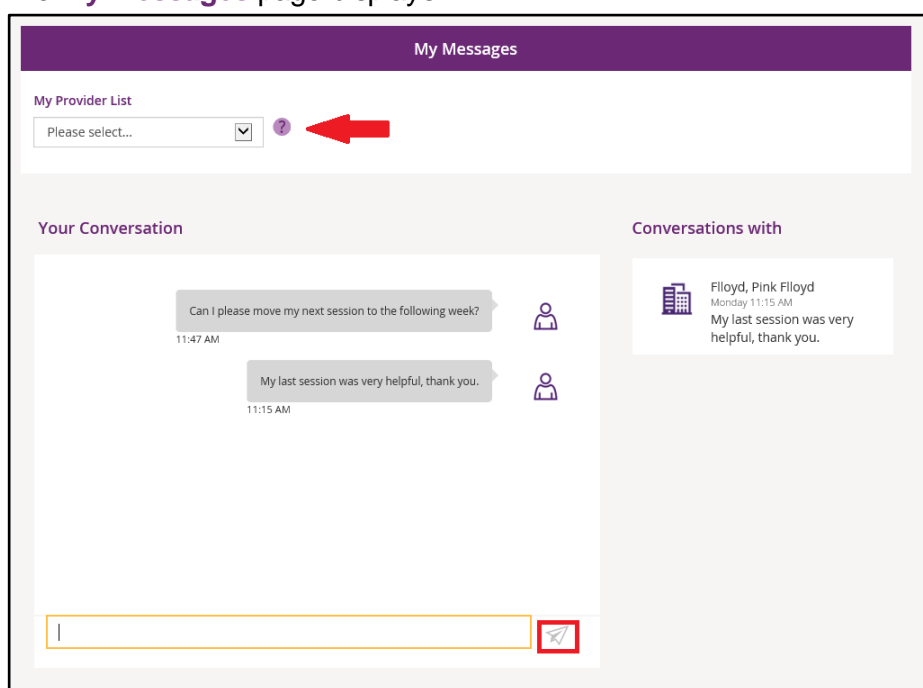
My Messages


This tile will only display if you have an active service booking with a registered provider. You can send instant messages to your providers.

1. Click on the **My Messages** tile on the home page.

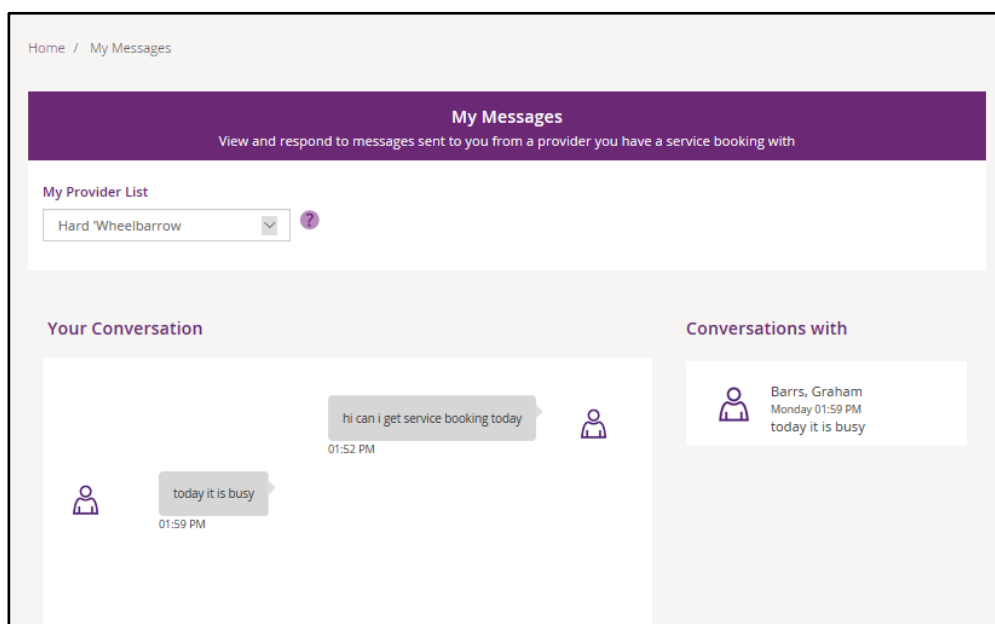


2. The **My Messages** page displays.



3. Select the chosen provider from the drop-down list under **My Provider List**.
4. Type your message in the yellow box and click the paper plane icon  to send the message.

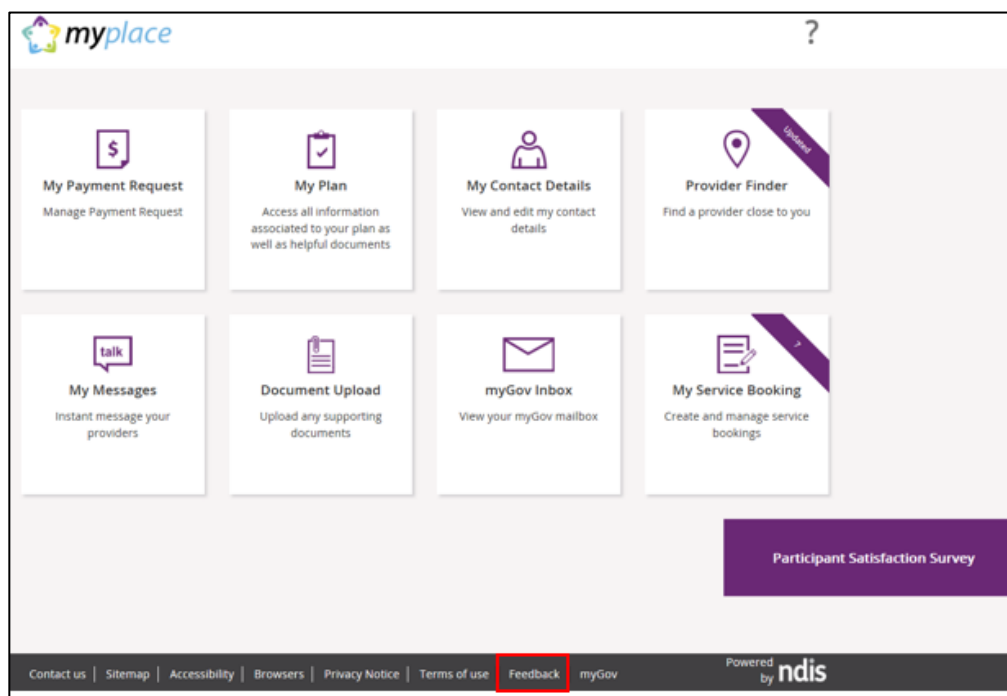
Note: Conversations (messages) will appear under the **Conversations with** tab. You can continue a conversation by selecting the providers' name.



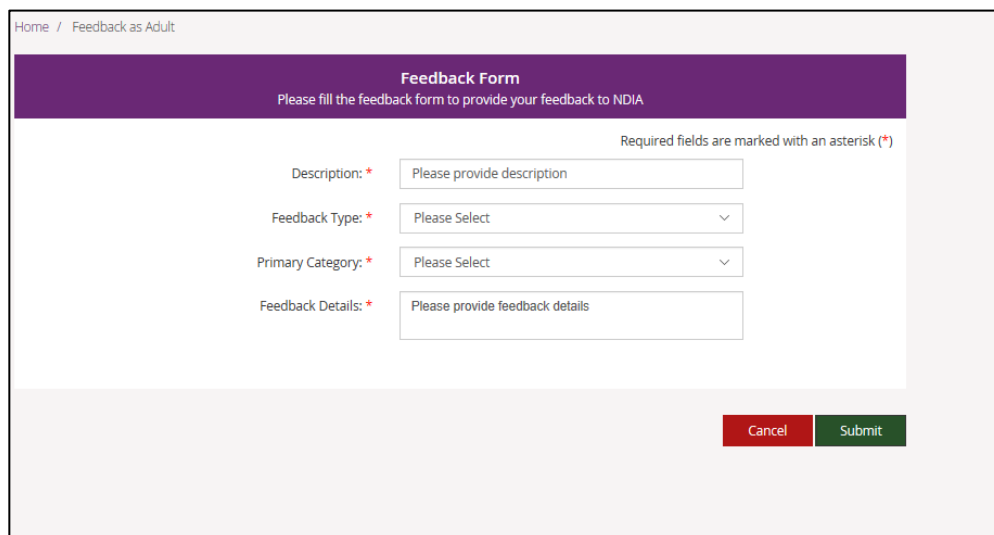
Leaving Feedback

If you would like to provide feedback, a compliment, complaint or enquire about an internal review or external review, this section allows you to record your feedback and submit it to the agency.

1. From anywhere in the portal, click the **Feedback** link at the very bottom of the page.



The **Feedback Form** opens.



Home / Feedback as Adult

Feedback Form
Please fill the feedback form to provide your feedback to NDIA

Required fields are marked with an asterisk (*)

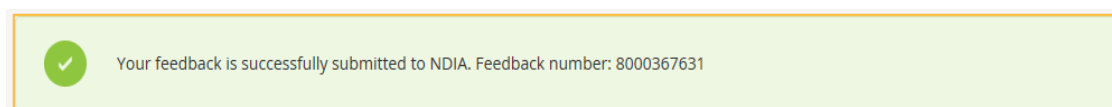
Description: *

Feedback Type: *

Primary Category: *

Feedback Details: *

2. Enter a **Description** in the free text field and select a **Feedback Type** and **Primary Category** from the drop-down lists. In the **Feedback Details** field provide as much information as possible to assist the staff with your enquiry.
3. Select the **Submit** button in the lower right-hand corner of the screen.
4. A message with the reference feedback number will display.



Logging out of myplace

Once you have completed all your tasks within the portal, log out by clicking on the down arrow next to your name at the top of the screen and select **Logout** from the drop-down menu.



If you signed in via the NDIS website, you will be returned to the NDIS front page. If you signed in via the myGov website, you will be returned to your myGov homepage.