

## NDIS Portal Instructions for Invoice updates

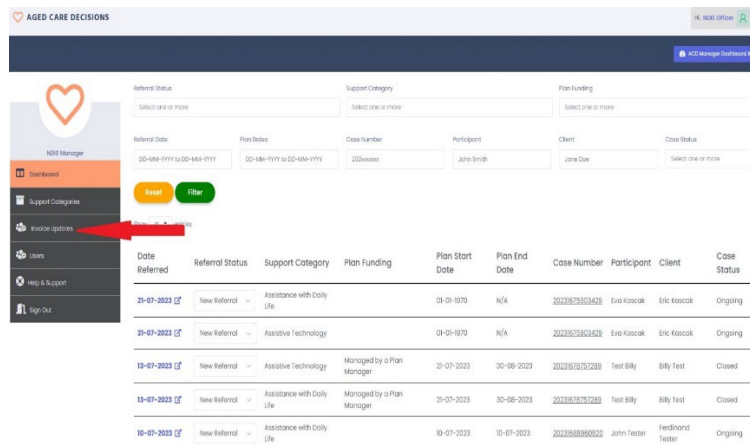
When a Placement Opportunity is converted into a successful partnership between a Provider and a referred Participant, several steps are required to finalise the case. Completing these steps ensures that Care Decisions records an accurate total value and issues the correct invoice amount.

As per our Terms & Conditions, the Service Agreement or Schedule of Support must be uploaded in the Aged Care Decisions Provider Portal within 72 hours of an agreement being signed by a participant referred by Care Decisions. T&Cs can be found at [NDIS Participant Introductions – Terms & Conditions | Care Decisions](#)

To assist you in this process please see the pictorial step by step instructions below.

### NDIS Portal – log in or dashboard page

1. Click on the Invoice Updates Tab to view the list of invoices (as indicated by red arrow).



AGED CARE DECISIONS

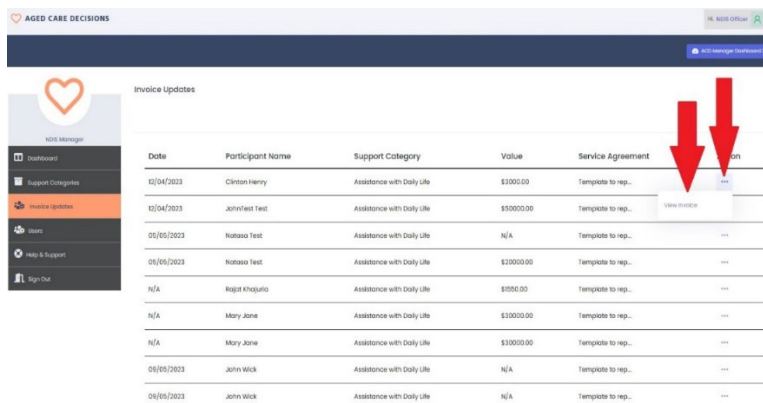
Referral Status: Select one or more | Support Category: Select one or more | Plan Funding: Select one or more

Referral Date: DD-MM-YYYY to DD-MM-YYYY | Plan Dates: DD-MM-YYYY to DD-MM-YYYY | Case Number: 2020xxxx | Participant: John Smith | Client: Jane Doe | Case Status: Select one or more

Buttons: [Reset] [Filter]

Date Referred	Referral Status	Support Category	Plan Funding	Plan Start Date	Plan End Date	Case Number	Participant	Client	Case Status
25-07-2023	New Referral	Assistance with Daily Life		01-01-1970	N/A	202287030449	Eva Kascook	Eric Kascook	Ongoing
25-07-2023	New Referral	Assistive Technology		01-01-1970	N/A	202287030449	Eva Kascook	Eric Kascook	Ongoing
13-07-2023	New Referral	Assistive Technology	Managed by a Plan Manager	21-07-2023	30-08-2023	202287030449	Test Billy	Billy Test	Closed
13-07-2023	New Referral	Assistance with Daily Life	Managed by a Plan Manager	21-07-2023	30-08-2023	202287030449	Test Billy	Billy Test	Closed
10-07-2023	New Referral	Assistance with Daily Life		10-01-2023	10-01-2023	2022888888000	John Tester	Ferdinand Tester	Ongoing

2. Click the three dots beside the participant and choose view invoice from menu options.



AGED CARE DECISIONS

Invoice Updates

Date	Participant Name	Support Category	Value	Service Agreement	Actions
02/04/2023	Clinton Henry	Assistance with Daily Life	\$2000.00	Template to rep...	...
12/04/2023	John Wick	Assistance with Daily Life	\$50000.00	Template to rep...	View Invoice
05/05/2023	Natasha Test	Assistance with Daily Life	N/A	Template to rep...	...
05/05/2023	Natasha Test	Assistance with Daily Life	\$20000.00	Template to rep...	...
N/A	Rajaz Khajuria	Assistance with Daily Life	\$2050.00	Template to rep...	...
N/A	Mary Jane	Assistance with Daily Life	\$32000.00	Template to rep...	...
N/A	Mary Jane	Assistance with Daily Life	\$30000.00	Template to rep...	...
05/05/2023	John Wick	Assistance with Daily Life	N/A	Template to rep...	...
05/05/2023	John Wick	Assistance with Daily Life	N/A	Template to rep...	...

3. Add the total invoice value (10% of the total agreed value with the participant excl. GST) under 'Invoice value'.

\* Please note the minimum fee \$1000 and maximum is \$4500. If the 10% of the agreed value of the agreement with the participant is less than \$1000, please use set minimum of \$1000 or \$4500 if it exceeds the maximum.

4. Upload or drag and drop Service agreement, quote, or schedule of supports, then click UPDATE, and OK.

The screenshot shows the 'AGED CARE DECISIONS' portal interface. The main content area is titled 'Invoice Update - Billy Nicks Test'. It contains several input fields: 'Client Reference' (302388640007), 'Client Name' (Billy Nicks Test), 'Participant Name' (Billy Nicks Test), 'Support Category' (Assistive Technology), 'Service Start Date' (01/01/2020), and 'Invoice Value' (0). A red arrow points to the 'Invoice Value' field. Below the form is an 'Editing Document' section with a table showing 'No Documents Found' and buttons for 'Download' and 'Delete'. A green arrow points to the 'No Documents Found' text. To the right is an 'Upload document' section with a 'Drag to Drop your File or Image' area. A red arrow points to this area. At the bottom of the form is a green 'UPDATE' button.

**Please Note:** Documents can be added, removed, or changed within the 72-hour window before an invoice is raised. Once an invoice has been raised, NO CHANGES CAN BE MADE in the portal. To make any changes after 72 hours please contact Care Decisions.

The Provider Portal allows only one document to be uploaded. Please upload a document that details costs for the duration of the service or first NDIS plan. This is required so our Accounts department can confirm and issue the correct invoice amount. If you do not upload this document within the 72-hour time frame, you may be invoiced for the default maximum: \$4,950. You will receive an email notification when the 72-time frame commences.

If you have any questions about invoicing or would like to organise a demonstration, please contact Care Decisions Provider Success team on 1300 150 724.