Portal User Guide

Existing Users

For Providers

Document Version 2.0

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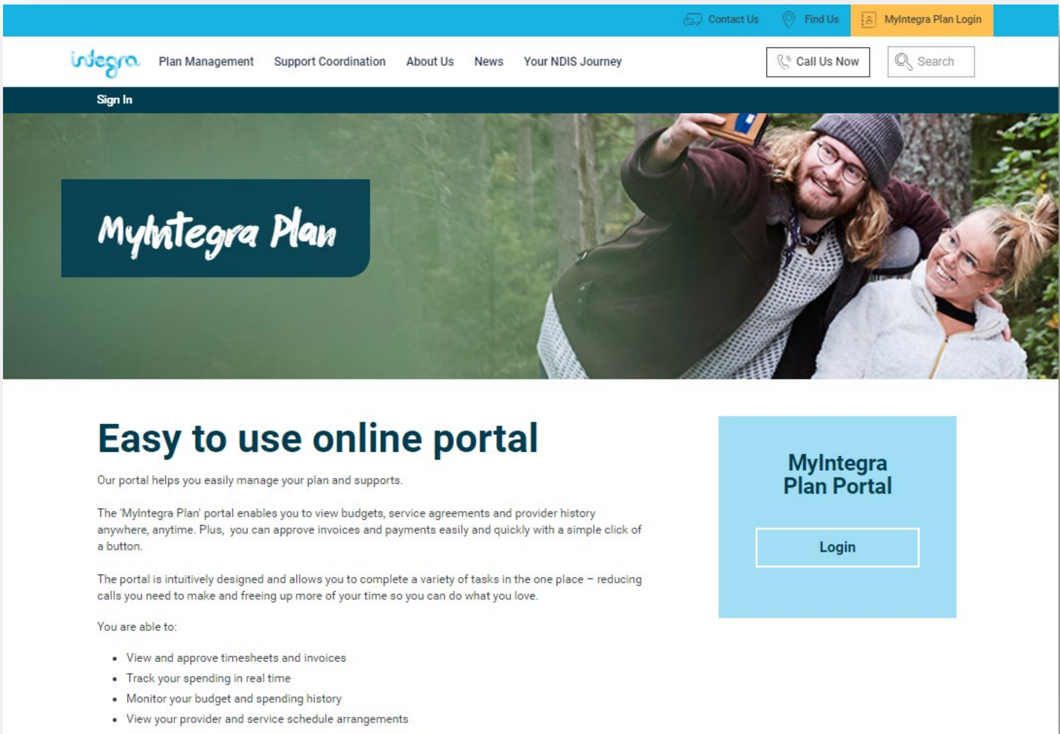
Introduction

Integra's customised Provider Portal has been developed as a tool to assist you with managing your invoice payments - anywhere, anytime. Our portal gives you peace of mind that customers have funds in their NDIS budgets to pay for the services they receive and provides an easy and intuitive platform for invoice submittal and approval.

Contents

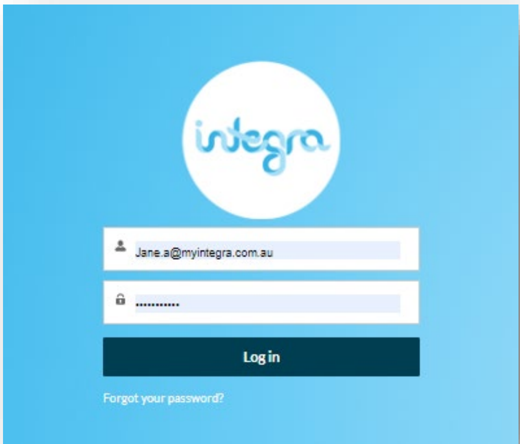
1. How to log in to the Integra Portal

Access the Integra Portal from our website myintegra.com.au/sign-in and click Login



2. Login

Enter your Myintegra login details provided in the email Integra sent you at end of May 2020. Only on first login will you be asked to enter a new password for access to the service. This username (your registered Integra email) and password replace your existing Myintegra portal login details.



3. Username/password reset

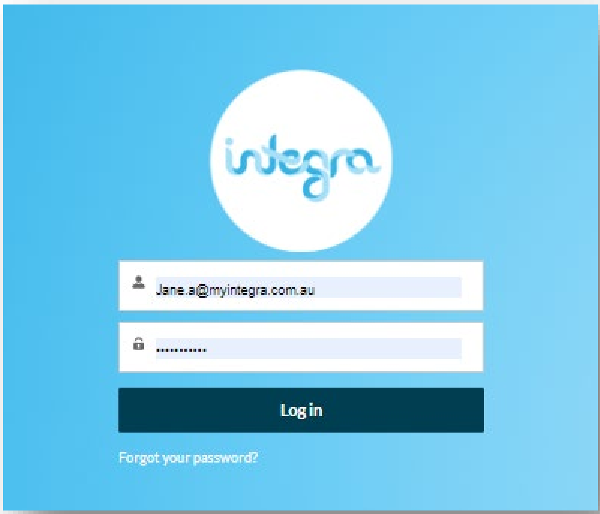
If you have forgotten your username and/or password or simply wish to reset them, simply follow these steps:

Go to the Integra Portal home page: **myintegraplan.com.au**

Select the blue hyperlink **"Forgot your username or password?"**

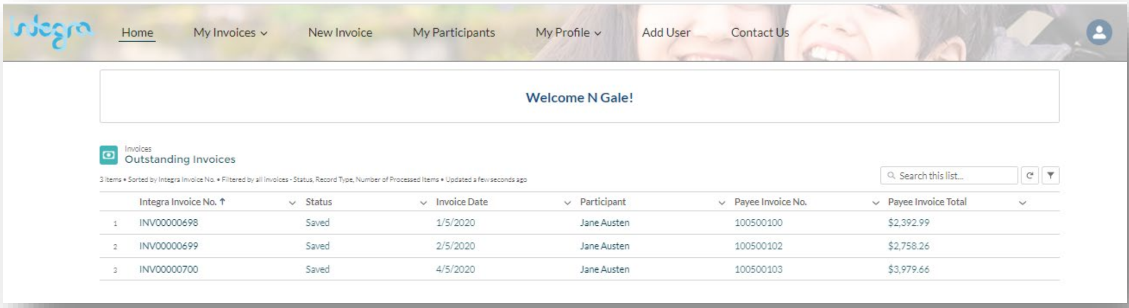
To reset your password, we'll need your username.

We'll send password reset instructions to the email address associated with your account.



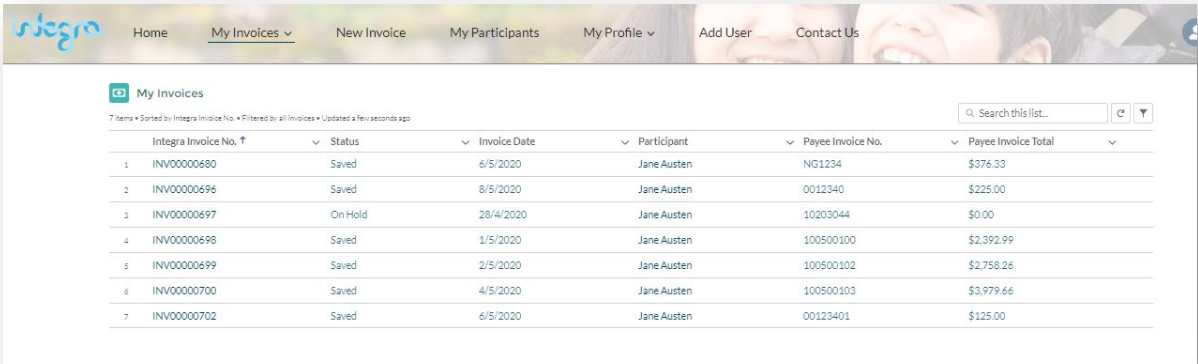
Alternatively, you can always call Integra customer service team at **1800 696 347** and our friendly team will be happy to guide you through resetting your password after verifying a few pieces of information.

3. How to navigate the Portal



- At the top of the page is a navigation bar with four tabs to help you navigate the portal:
  a. **Home:** Where you can view the latest invoice information and budget status
  b. **My Invoices:** Where you can view the status of all submitted invoices and create new invoices
  c. **New Invoice:** Where you can raise a new invoice
  d. **My Participants:** Where you can see information about your Integra enrolled customers
  e. **My Profile:** Where you can view and edit your profile details, such as contact information and other company members' portal access

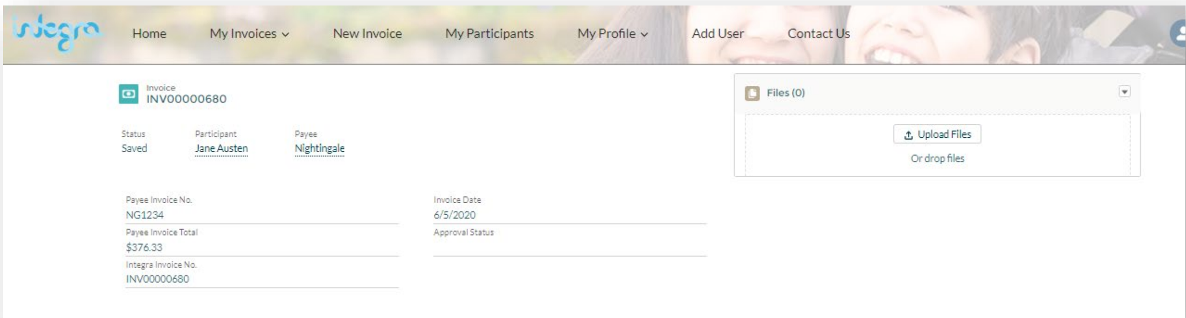
4. How to search for an invoice



	Integra Invoice No.	Status	Invoice Date	Participant	Payee Invoice No.	Payee Invoice Total
1	INV00000680	Saved	6/5/2020	Jane Austen	NG1234	$376.33
2	INV00000696	Saved	8/5/2020	Jane Austen	0012340	$225.00
3	INV00000697	On Hold	28/4/2020	Jane Austen	10203044	$0.00
4	INV00000698	Saved	1/5/2020	Jane Austen	100500100	$2,392.99
5	INV00000699	Saved	2/5/2020	Jane Austen	100500102	$2,758.26
6	INV00000700	Saved	4/5/2020	Jane Austen	100500103	$3,979.66
7	INV00000702	Saved	6/5/2020	Jane Austen	00123401	$125.00

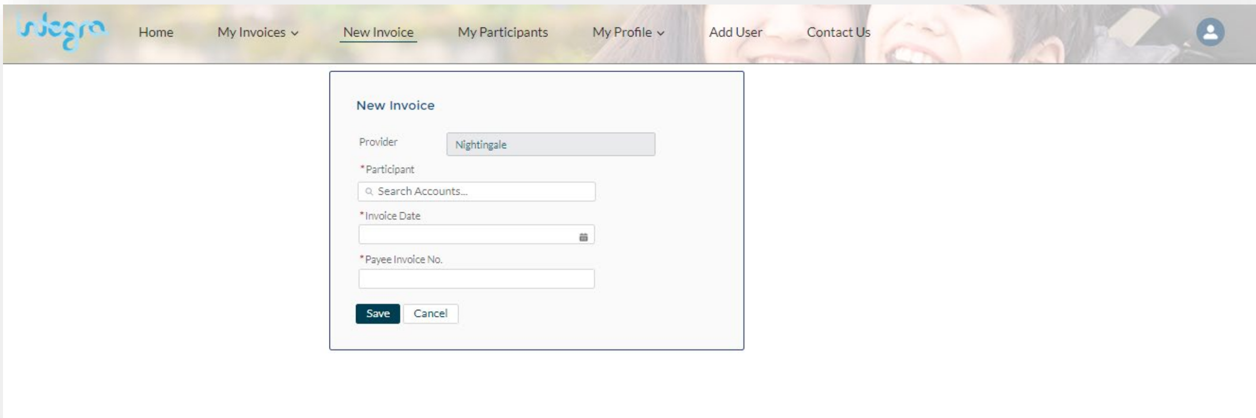
- Under **My Invoices** in the navigation bar, you can search for an invoice using the following filters:
  a) **Integra Invoice No:** The unique ID assigned to your invoice by Integra
  b) **Status:** The status of your invoice as it moves through processing
  c) **Invoice Date:** Date of service
  d) **Participant:** Participant Name as registered with NDIS
  e) **Payee Invoice No.:** The # that providers have assigned to their invoice
  f) **Payee Invoice Total:** Total $ amount of submitted invoices
- Click on the **'Integra Invoice No.'** to see additional information about an individual invoice including individual line item status

- Click on **'Attachments'** to attach an original invoice.

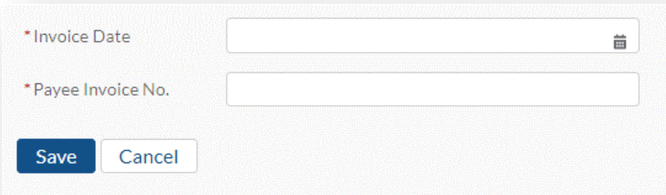


5. How to create and submit an invoice

- Click on the **New Invoices** tile in the navigation bar and select **Participant Invoice is related** to begin creating a new invoice.

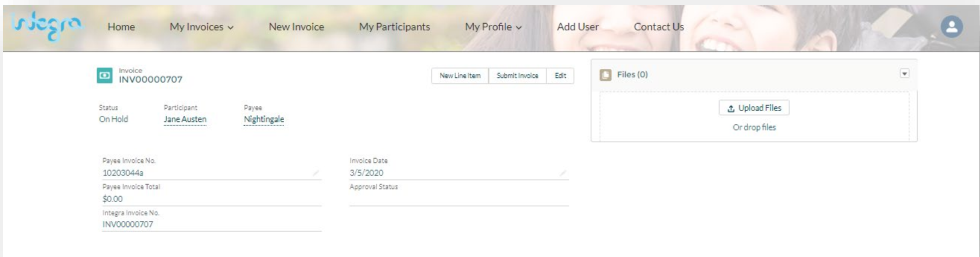


- Enter the date of the service provided in the Invoice Date box along with your invoice number in the Payee Invoice No. box, this will help you reconcile your invoices in the future. Click Save when completed

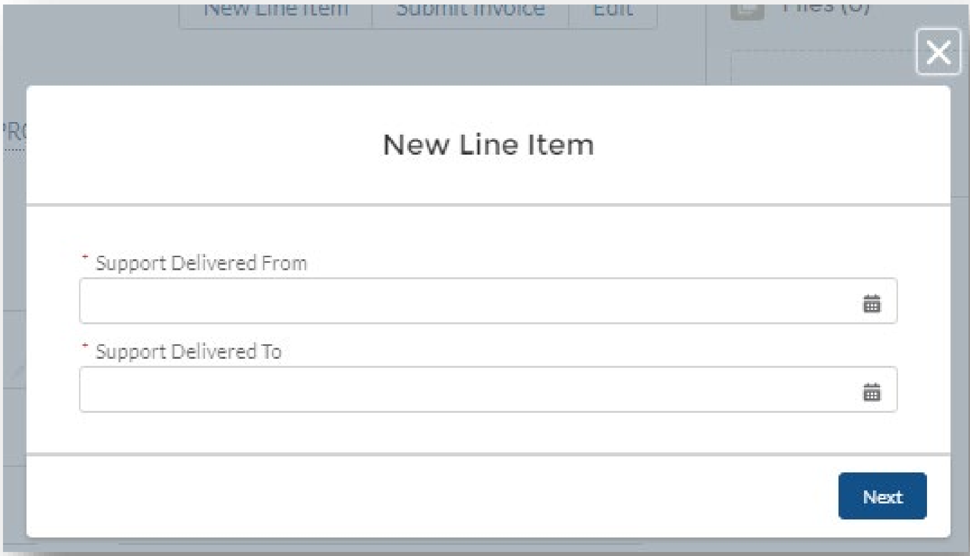


- Next, enter in the invoice detail:

   a. **Add New Line:** You can create multiple lines for different services in a single invoice by clicking on the Add New Line item link

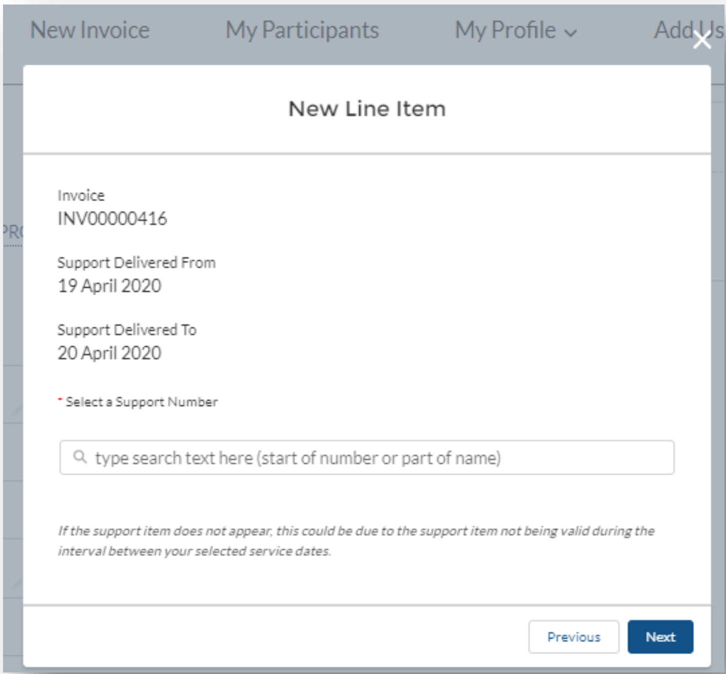


   b. **Support delivered from/to:** These are the dates your services were provided to the participant. If you only provided one day of service, make the support delivered from and to dates the same



c. **Support Number:** Select a support number for the service provided to the participant. This drop-down list is searchable and only approved support services for each participant will appear

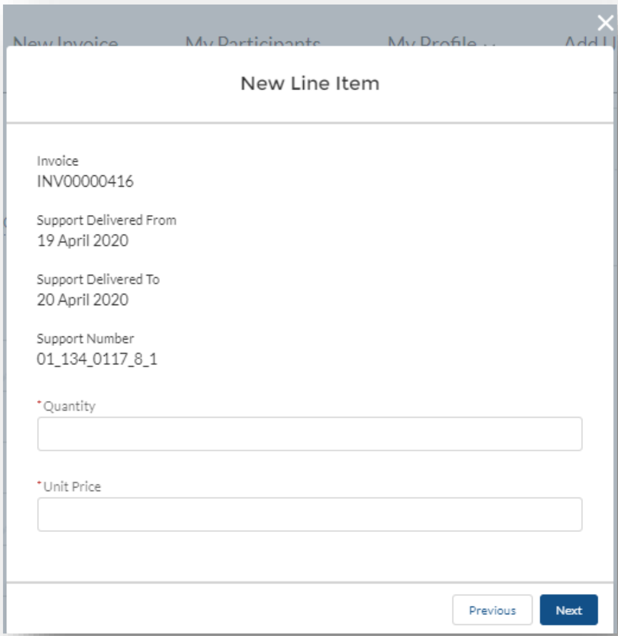
Click **Next** when complete



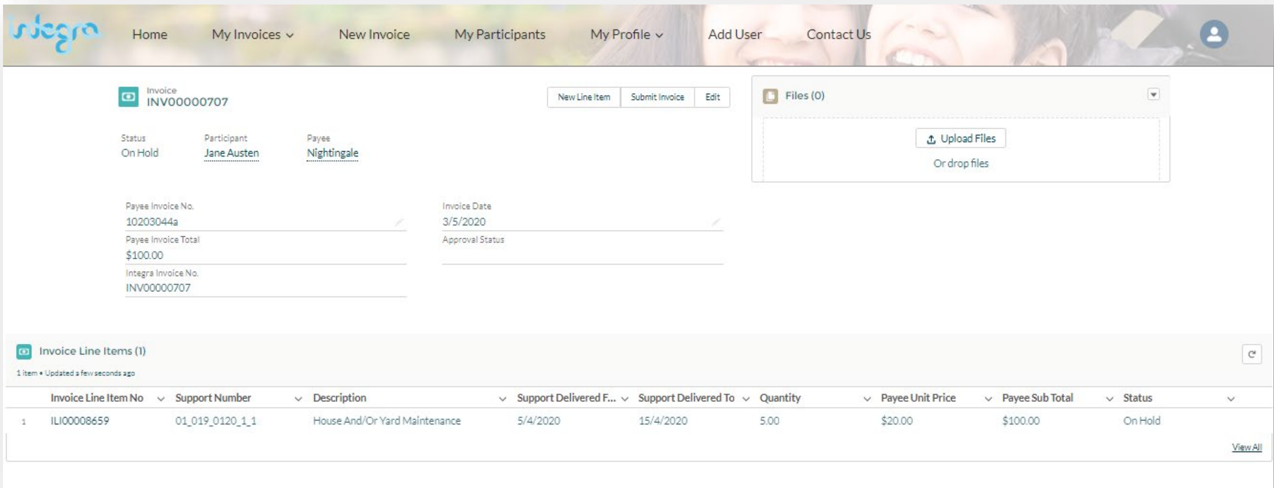
d. **Quantity:** This is the number of hours of service you provided or the # of the good(s) provided

e. **Unit Price:** This is the hourly rate for the service you provided, or the unit rate of the good(s) provided.

Click **Next** when complete and the line item will be added to the invoice



- You have the option to **Save** or **Submit** your invoice.

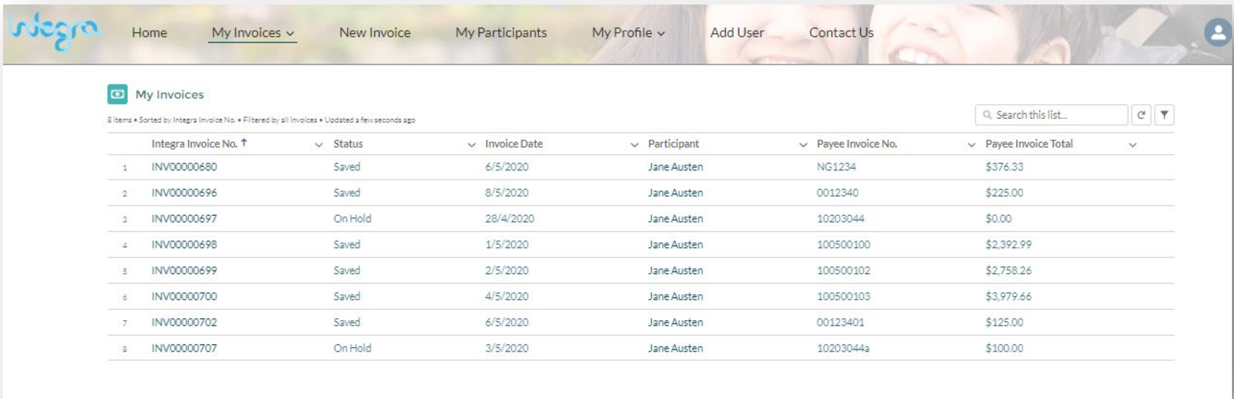


If you **edit** your invoice, it will not be visible by the Participant for approval. It will not enter the payment process until it is submitted.

You can add the original invoice by clicking on Upload Files. A new window will pop up allowing you to attach your invoice.

If you **Submit** your invoice, it will move into either **"Needs Approval"** or **"Approved"** status and will enter the payment process.

6. How to export an Invoices Report



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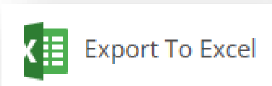
7	INV00000702	Saved	6/5/2020	Jane Austen	00123401	$125.00
8	INV00000707	On Hold	3/5/2020	Jane Austen	10203044a	$100.00

Integra offers providers the ability to export a report of invoices that have been submitted in the Integra Portal.



Simply click on the **My Invoices** tile in the navigation bar and click on the **'Export'** button. This will prompt your browser to download an Excel report of all your submitted invoices.

The report will detail the Invoice Number, Participant Name, Total Amount, Payment Date, Status of Invoice and Remittance Number.

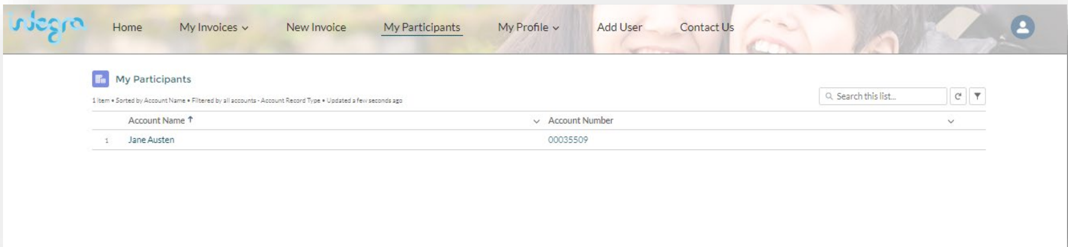
7. Remittance Advices

The Remittance Advice will be sent to your registered email address on successful payment of invoices. Remittance advices are not available via the Portal.

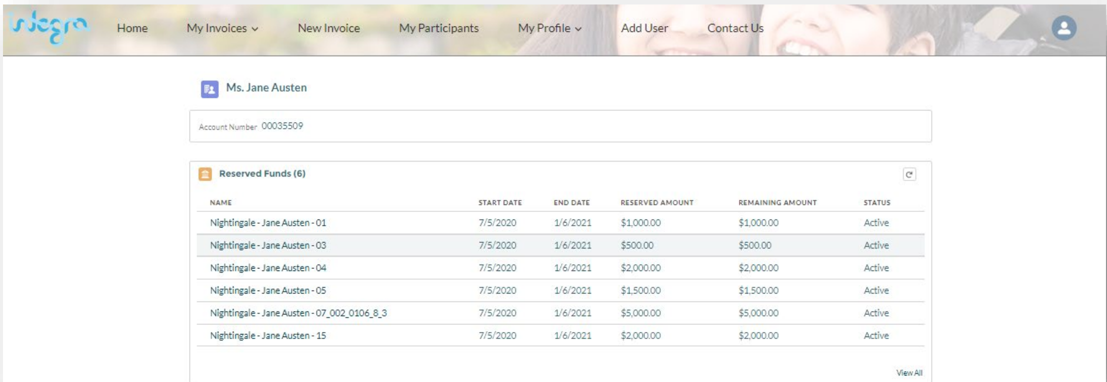
8. How to view Reserved funds for the Integra participants I work with

Integra offers you the ability to view your participant Service Bookings (Reserved Funds for participants you work with in the Integra Portal).

- Click on the **My Participants** tile in the navigation bar



- The **'Select Participant'** tab allows you to view a specific participant
- The **'Select Reserved funds"** tab enables you to see a full overview of reserved funds



- If you are unable to locate a participant or support category, this means that the funds have not been allocated. This can be resolved by sending a signed Schedule of Support through to choiceandcontrol@myintegra.com.au.

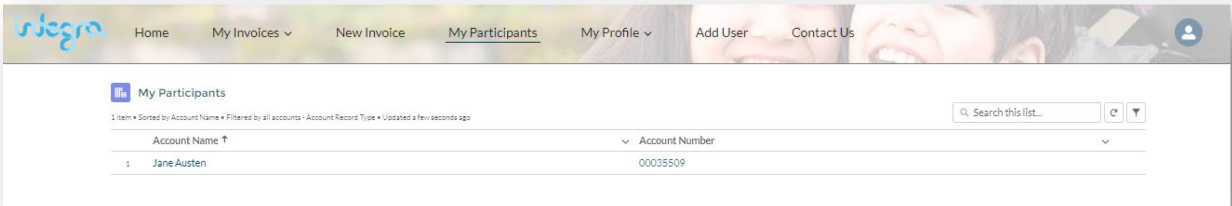
9. How to see information about the Integra participants I work with

- Click the **My Participants** tab in the navigation bar to display the list of Integra customers associated with your account. The following participant information will be displayed:

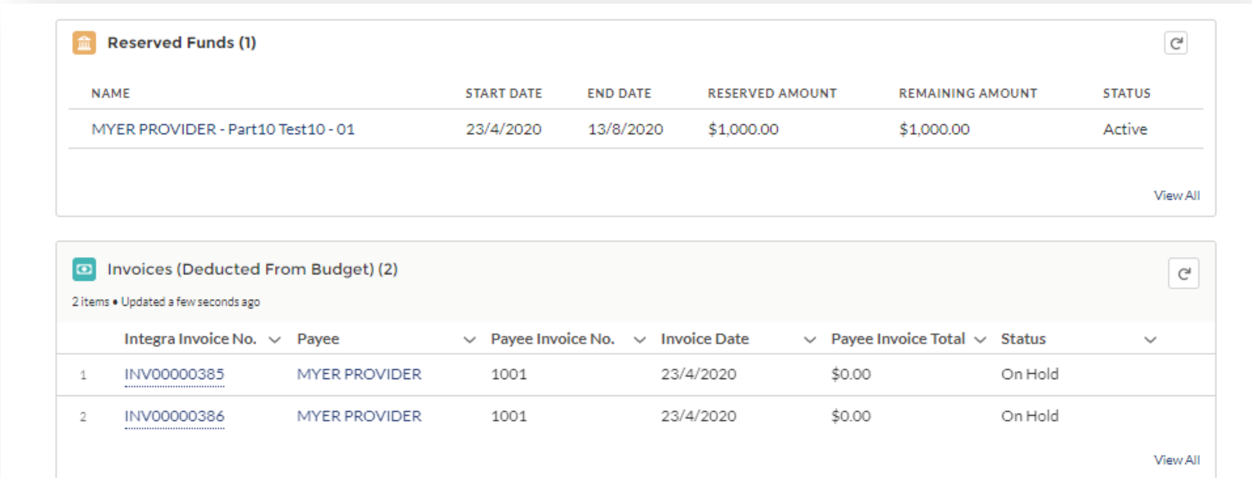
  a. Integra account name

  b. Contact details (phone and email)

  c. NDIS number



- Clicking on a participant name will provide a list of relevant participant reserved funds and all invoices completed for that participant including invoice no, dates of service, Invoice total and Status



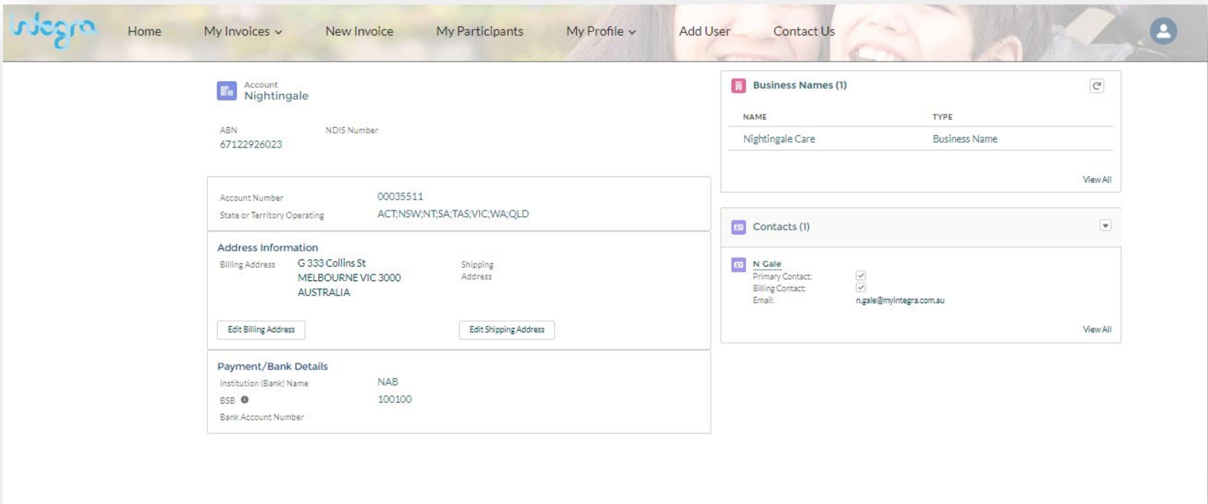
10. How to update my contact details

- Click **My Profile** on the navigation bar to view and edit information related to your Integra account, including company details

  a. You can edit Contact Address details

  b. You can select Primary Contact and Billing Contact

  c. You can check Registered Bank details



We hope you find your new Integra Portal helpful!

*Please feel free to contact our friendly customer service team on **1800 696 347** or email choiceandcontrol@myintegra.com.au if you have any questions or feedback*