

Reserving funds for your providers

Get greater control of your budget by setting aside NDIS funds for a specific provider or service

myintegra

NDIS Plan Management

We're all about giving NDIS participants choice and control.

Reserving funds gives you the confidence that money is available to get the services you need. Plus, there is the extra assurance that your provider gets paid risk-free, with no budget overspend issues.

MyIntegra is one of the only plan managers that can help easily set this up for you – and it only takes three simple steps.

Let's get started.

Step 1: Create a Schedule of Supports

You or your Support Coordinator should determine the type of supports you need and want from certain providers, and how long these services will be required to help achieve your plan goals. This agreed amount of services is called a Schedule of Supports.

Step 2: Reserve agreed funds

Send the Schedule of Supports to us via email at choiceandcontrol@myintegra.com.au, or simply give us a call at **1800 696 347**, and we can set aside the right amount of funds.

Then, through the MyIntegra Portal, you will be able to view the reserved funds for these service bookings, the funds spent, and the balance of funds remaining.

Step 3: Stay in control

If you decide you want to change the service booking or receive services from another provider, that's no problem.

You can contact us any time and we can change the reservation of funds to your requirements. We'll also keep your support coordinator in the loop if any changes are made.

Free template



You can download a Schedule of Supports template from our website.

[myintegra.com.au/
schedule-of-supports](https://myintegra.com.au/schedule-of-supports)



How to reserve funds on the Portal

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Participants and nominees can reserve funds through the portal easily, and support coordinators and providers can view these reserved funds.

To view your reserved funds entries, simply click 'My Money' then 'Reserved Funds' to view your active reserved funds.

Step 1

Log in to the MyIntegra Portal.

Step 2

Click the 'My Money' tab on the main menu.

Step 3

From the dropdown menu, select 'Create Reserve Fund'.

Step 4

In the 'Provider' field, search and select the provider you wish to reserve funds for.

Step 5

In the 'Budget' field, select the budget you are reserving the funds from.

Step 6

In the 'Budget Line Item' field, select the budget line item.

Step 7

In the 'Total Remaining Amount' field, enter the amount of funds you wish to reserve for this provider.

Step 8

Click 'Save'.

We're ready to help



Call our friendly customer service team for help reserving funds

1800 696 347

